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STATE OF MONTANA  
DEVELOPMENTAL DISABILITIES PLANNING AND ADVISORY  
COUNCIL  
and  
THE DEPARTMENT OF SOCIAL AND REHABILITATION SERVICES

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MONTANA STATE PLAN FOR DEVELOPMENTAL DISABILITIES  
SERVICES / 1987 - 1989

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## INTRODUCTION

The purpose of the Montana State Plan for Developmental Disabilities Services is threefold. First, it is the intent of the U. S. Congress for states to develop a contract with the Federal government for receipt of funds offered under the Basic State Grant Program of Public Law 98-527, the Developmental Disabilities Act of 1984. Second, through this plan, the State of Montana advises citizens about the manner in which the Basic State Grant Program operates and about the nature of its goals, objectives and planning process. Third, the State's plan can provide the Administration on Developmental Disabilities and the Secretary of Health and Human Services with reliable, useful information upon which to base current and future national policy regarding the Basic State Grant Program and the needs of persons with developmental disabilities.

The Montana State Developmental Disabilities Planning and Advisory Council has committed to administering federal funds, paid to the State of Montana under P.L. 98-527, to make a significant contribution toward strengthening services to persons with developmental disabilities. In pursuit of this obligation, the council sets as its purpose the following initiatives:

- \* Provide a forum for consumer and professional involvement in policy and priority determinations;
- \* Provide the means for exploring all avenues regarding the provision of services through state, local, private and public agencies;
- \* Specify in writing the objectives it intends to address in each fiscal year and redefine, when necessary, these same objectives on or before October 1 of each year;
- \* Develop, in conjunction with state agencies serving persons with developmental disabilities, a three-year State Plan which sets forth service goals and service priorities for that period;
- \* Work to foster and facilitate the integrated short and long-range planning and coordination of service capacities of all public developmental disability agencies.

The following pages contain the contributions of DDPAC and other agencies, public and private, to service maintenance and service development for the period 1987-89.



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**DEVELOPMENTAL DISABILITIES PLANNING AND ADVISORY COUNCIL**  
25 South Ewing - Room 506, Helena, MT 59620 (406) 449-8325

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DEVELOPMENTAL DISABILITIES STATE PLAN

FISCAL YEARS 1987 - 1989

\*\*\* THE THREE-YEAR PLAN \*\*\*

Submitted by:

The Developmental Disabilities Planning and Advisory Council,  
State of Montana

Submitted to:

The United States Department of Health and Human Services, Office  
of Human Development Services, Administration on Developmental  
Disabilities, Office of State Program Operations

This State Plan is a joint endeavor of the State Planning Council  
and the State Administering Agencies for Developmental  
Disabilities.

A handwritten signature in cursive script, reading "Dave Lewis".

Dave Lewis, Director  
Department of Social and  
Rehabilitation Services

8/13/86  
Date

A handwritten signature in cursive script, reading "Gary R. Marbut".

Gary R. Marbut, Chairman  
Developmental Disabilities  
Planning and Advisory  
Council

AUG 18 1986  
Date



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SECTION 1  
DEVELOPMENTAL DISABILITIES  
DEFINITION AND IMPACT



## SECTION 1

### DEVELOPMENTAL DISABILITIES: DEFINITION AND IMPACT

The State of Montana provides, through its various subagencies, a variety of developmental and support services to persons with developmental disabilities. Funding for these many different programs is, in general terms, derived from a combination of State dollars and Federal Assistance monies. The State delivers and/or oversees these services on the basis of categorical disabilities and eligibility characteristics...factors which are given definition by State law and State Agency policies and procedures.

Under current statutes, the State definition profiles developmental disabilities by "condition" or "category":

"'Developmental disabilities' means disabilities attributable to mental retardation, cerebral palsy, epilepsy, autism, or any other neurological handicapping condition closely related to mental retardation and requiring treatment similar to that required by mentally retarded individuals if the disability originated before the person attained age 18, has continued or can be expected to continue indefinitely, and constitutes a substantial handicap of the person."  
(53-20-202, MCA)

With reference to this definition, each component of Montana's human service system defines eligibility for services on its own terms. Special education, vocational education, community mental health, institutional care, nursing home care, foster home care, community homes, protective services and others all have slightly different eligibility criteria. Persons are eligible or ineligible for needed services based on individual service-agency criteria. Within this framework of categorical disabilities and agency eligibility profiles, the State offers the bulk of the developmental disability services to persons involved in mental retardation.

In addition to statutorily established treatment programs and support services, the State of Montana also participates in the Basic State Grant Program under Public Law 98-527, the Developmental Disabilities Act of 1984. The Montana State Developmental Disabilities Planning and Advisory Council (DDPAC) carries out the mandates of this federally-funded program with the added authority of State Legislation (2-15-2204 and 53-20-206, MCA).

The Basic State Grant Program is designed to assure that persons with developmental disabilities achieve maximum integration, independence and productivity. The nationwide state-council system developed for this purpose is intended to coordinate, monitor, plan and evaluate service delivery and service outcomes.

In honoring this mandate, the State Council adheres to the Federal functional definition. To the extent the State and its Agencies work with the Council, Montana also acknowledges this definition. Written into Federal Law in 1978, this definition, unlike the State's, makes no special mention of specific conditions; instead it looks at the pervasiveness and severity of the disability.

The definition of developmental disabilities, as contained in Public Law 98-527, the "Developmental Disabilities Act of 1984," is:

"...a severe, chronic disability of a person which:

- is attributable to a mental or physical impairment or combination of mental and physical impairments;
- is manifested before the person attains age 22;
- is likely to continue indefinitely;
- results in substantial functional limitation in three or more of the following areas of major life activity:
  - . self-care;
  - . receptive and expressive language;
  - . learning;
  - . mobility;
  - . self-direction;
  - . capacity for independent living; and
  - . economic self-sufficiency; and
- reflects the person's need for a combination and sequence of special, interdisciplinary, or generic care, treatment, or other services which are individually planned and coordinated."

The net effect of having and working with two definitions is three groups of persons with developmental disabilities of whom the Council and the State should take cognizance. These groups are:

1. The overlap population: The individuals who meet the criteria in both definitions are those who are mentally retarded, or those whose cerebral palsy, epilepsy or autism manifested itself prior to age 22 and is sufficiently severe that it limits the person's ability to function in at least three major life activity areas. Belonging to this category will be all individuals currently living at the State's two facilities for persons with developmental disabilities (i.e., MDC and Eastmont), virtually all individuals currently living in group homes funded by the Developmental Disabilities Division, all people in work activity type programs, and all children served by the Developmental Disabilities Division.

2. The State population with Developmental Disabilities: Those individuals whose conditions are not severe enough to meet the criteria in the Federal definition. Included would be many persons living in semi-independent living settings, all persons with developmental disabilities living independently, many individuals in sheltered workshops, and most who are now working competitively.
3. The Federal population with Developmental Disabilities: Those individuals whose conditions are very severe but are not mental retardation, cerebral palsy, epilepsy or autism. In particular, this group would include individuals who are seriously disturbed emotionally, or who are seriously handicapped physically (including some sensory impaired persons) as long as they meet the criteria in the Federal definition (severe, chronic, manifestation prior to age 22, need for multiple services, etc.).

One can see from the Federal (and State Council) perspective, developmental disabilities are severe, chronic, mental and/or physical impairments which occur at an early age, are likely to continue indefinitely, and have a pervasive effect on the individual's functional abilities and on their need for services. The most immediate impact of this functional definition on the Council's planning and advisory roles is the necessity to talk to and coordinate with not only the traditional State Developmental Disabilities Program Agencies, but also with the many different state services such as Deaf and Blind Programs, Handicapped Children Services, Special Services (under the Office of Public Instruction), Aging Services, Corrections and Mental Health Services. With the onset of its 1987 Plan Year, the State Council will again respond to this increased planning and advocacy responsibility under a set of goals, objectives and activities (see Section 4 of this Plan).

Because of this "expanded" definition, DDPAC has the major task of determining the scope of the definition's impact and the location of State and Private Agencies which serve or could potentially serve persons identified under this broader grouping of disabilities. Appendix E presents a list of impairments which could be considered developmental disabilities under the Federal functional definition.

## ESTIMATES OF POPULATION WITH DEVELOPMENTAL DISABILITIES

In Public Law 98-527, the Developmental Disabilities Act of 1984, the U.S. Congress stated its findings as follows:

1. There are more than two million persons with developmental disabilities in the United States;
2. Individuals with disabilities occurring during their developmental period are more vulnerable and less able to reach an independent level of existence than other handicapped individuals who generally have had a normal developmental period on which to draw during the rehabilitation process;



3. Persons with developmental disabilities often require specialized lifelong services to be provided by many agencies in a coordinated manner in order to meet the person's needs;
4. Generic service agencies and agencies providing specialized services to disabled persons tend to overlook or exclude persons with developmental disabilities in their planning and delivery of services; and
5. It is in the national interest to strengthen specific programs, especially programs that reduce or eliminate the need for institutional care, to meet the needs of persons with developmental disabilities.

For the State of Montana, for its subagencies, for the State Council and for the many other public and private agencies, however, the task of determining numbers, characteristics and needs of all citizens with developmental disabilities remains a complex and demanding process.

### Problems

Council estimates of developmental disabilities must consider the concept of functional limitations. Such estimates are based on the assumption 1.57 percent of the general population are involved in developmental disabilities. This factor derives from a major study, in 1978, of the new Federal definition. Through a survey of raw data in the 1976 "Report of the U.S. Census Bureau Survey of Income and Education," researchers estimated the percentages and numbers of individuals who demonstrated functional limitations in the group of seven (7) major life activities set down in the Federal definition.

Appendices A and B offer estimated population figures using not only the Federal 1.57 percent factor, but also two other, "traditional" percentage figures. These estimates offer both statewide and regional perspectives. Appendix B shows how dramatic the difference can be in estimates of persons with developmental disabilities.

These estimates are further compounded by the fact that:

1. Most statistical information on numbers of Montanans in any category is based on census information and the information gathered in a census is personal prerogative (e.g., a person may not consider him/herself handicapped or disabled and would not answer a question that would identify them as such).
2. A specific question is not asked on most census questionnaires; the closest question asks if a person has a disability which prevents employment or use of public transportation.
3. Not all State Agencies explicitly determine how many of their service consumers have developmental disabilities, since being developmentally disabled is not relevant for their eligibility determination process. For example, there is no accurate count

of the number of individuals currently in special education or vocational rehabilitation.

4. When Agencies count the number of people being served, they are not generally using the Federal definition.
5. There is no fully unduplicated count available. For example, there is no way to know how many individuals with developmental disabilities are also currently service consumers of Vocational Rehabilitation (VR) services or how many VR service consumers in the past year also accepted services through Developmental Disabilities Community Programs.
6. Persons with developmental disabilities who are not served directly through the State's Developmental Disabilities community-based and institutional programs have been, historically, very difficult to identify.

There are many important issues (see Section 3) which State Agencies face in maintaining current services and in planning for unmet or insufficiently met service and support needs. These issues are compounded when the Council and the State must work with differing definitions and with inadequate population estimates.

In making estimates of numbers, characteristics and needs of persons with developmental disabilities in Montana, service and capacity planners can expect to find these persons in many different locations throughout the State. For example, persons with developmental disabilities would be in the following programs:

- Developmental Disabilities Division-funded community programs.
- Special education programs inside and outside the State.
- State operated institutions, particularly the Montana Developmental Center (MDC).
- Private nursing homes.

Services for these persons would fall into three (3) major groups:

1. Persons requiring intensive services.
2. Elderly persons requiring age-appropriate services.
3. Persons who can be expected to move or progress through services to increased independence.

In respect to where these persons receive services and in respect to their characteristics and needs, the State's population of persons with developmental disabilities is very diverse. Some of the more significant dimensions which contribute to this variety are:

- Age (preschool, school age, working age adults, elderly)

- Specific type of condition resulting in the developmental disability (mental retardation, cerebral palsy, emotional disturbance, etc.);
- The specific areas of functioning that are limited (self-care, learning, receptive and expressive language, mobility, etc.);
- The severity of the disability;
- The presence of multiple handicaps, including behavior problems combined with mental retardation;
- The presence of medical complications;
- Sex;
- Ethnic group; and
- Income level.

A sensible estimate, in light of these different forces and concerns, of persons with developmental disabilities currently eligible for and receiving State supported services, or eventually to be needing treatment and support services, should make some specific assumptions. Children with developmental disabilities would be:

- All children receiving services from the Developmental Disabilities Division.
- All children at MDC, Eastmont, or Warm Springs.
- All children sent out-of-district or out-of-state for special education services.
- All deaf or blind children.
- Moderately or severely retarded children.
- All children in special education who are reported to be severely handicapped, if they have the following conditions:
  - . emotional disturbance
  - . deafness
  - . blindness
  - . orthopedic impairment
  - . multiple handicap
  - . other health impairment

(Note that severe speech impairment and hard of hearing are not included.)

Adults with developmental disabilities would be:



- All adults served by the Developmental Disabilities Division.
- All adults living at MDC or Eastmont.
- Those adults not now receiving Division services but whom the Division has identified as needing services; this includes some people currently living in nursing homes, some people on a formal waiting list for an existing program, and some identified as needing a service who are not on a waiting list.
- Mentally retarded people served by the Rehabilitative Services Division.
- All adults considered, by the Community Services Division, to have a developmental disability.

Planners using this document should also note that not all persons served in Montana's Community-based Developmental Disabilities System are included in the 1.57 percent factor for estimated developmental disabilities. The reason for this is that not all persons with mental retardation, cerebral palsy, epilepsy or autism would fit within the Federal functional definition. All persons served under the State definition are, however, included in the data concerning services provided by State Agencies (see Section 3). There is then, a variance between total number of persons in the State and the total number of persons receiving services. Estimates used in past planning efforts, have also been inferential and not descriptive in nature. Historically, such population estimates have been politically motivated...simply because the outcomes were always tied to revenues.

Since estimate factors have ranged from a "low" of 1.57 percent to a "high" of 8.5 percent (one in twelve persons), numbers, characteristics and needs have varied and flexed correspondingly. The results have been confusing, if not, at times, pointless. However, the 1.57 percent used by the Federal definition is the most empirical and, currently, most useful estimate for the State Council's service-planning purposes.

Working with the conflict of different definitions and in full recognition of the difficulty in counting who needs what services and why, the State Council continues to advocate for accurate identification of disabilities and comprehensive assessment of service needs. Beyond estimates of special populations, specific efforts at finding and identifying persons with human-service needs occur regularly in the State's various service agencies. Positions in State employment such as client-service coordinators and evaluation specialists work full-time to monitor and analyze the numbers (and needs) of persons with developmental disabilities. From these and other sources, the State can derive its profile of special populations and of related service needs, service gaps and service barriers.

For Montana's population of persons eligible for developmental disabilities services, the State works to maintain a record of persons

receiving one or more services and a record of persons waiting for one or more services. These records are not necessarily unduplicated since persons can be in both counts; however, current numbers show more than 1,800 persons (adults and children) receiving one or more units of service in the State-supported developmental disabilities service network, and more than 840 persons on the State's "waiting list" for services. (Note: Currently, of the 840 persons on the waiting list, 46 percent are receiving at least one service).

### Other Factors<sup>1</sup>

Montana's definition of developmental disabilities excludes approximately 85 percent of the special education students from established developmental disabilities services. However, research shows these services are needed. Special education students who are hard of hearing, deaf, orthopedically impaired, emotionally disturbed, visually handicapped, learning disabled, speech impaired or deaf and blind are not eligible for the long-term habilitation services offered eligible persons in the established service network. In many cases, it appears these ineligible persons have greater need for residential and vocational services than a number of persons with mild mental retardation. If the State of Montana were to adopt the Federal functional definition for developmental disabilities, these persons and many others would become eligible for established services. However, because there is already a substantial waiting list for these services, and in view of the increased cost of applying the expanded Federal definition, the State Council can anticipate the need for prolonged advocacy to promote systemic improvements for unmet needs.

Section 3 of this plan presents, in a standard "cross-reference" format, the current and, where they exist, planned service activities of the State's various subagencies. The information is offered with the intent to inform and to, perhaps, make easier planning and decision-making for increased capacities in present services and for expansion to meet new and yet undocumented service needs.

### Needed Capacities

In 1980, the State Council accomplished an assessment of Montana's system of developmental disabilities services. One outcome of this study was a set of recommendations and a view of needed changes, improvements, strategies and related consequences for the State's service system. Many of these recommendations and new capacities still await planning and implementation activity. Appendix J contains a summary of this assessment information. To the extent possible over the past three years, the State Council has shaped a number of its objectives around these findings. This 1987 Service and

Advocacy Plan continues the same effort with the added emphasis, over the next two years, on innovative statewide prevention initiatives, and over the next three years, on innovative, statewide employment-related activities.

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<sup>1</sup>REACH Inc. Final Report on "A Model for Transitioning Special Education Student Into Adult Services"; 1983



SECTION 2

THE MONTANA STATE DEVELOPMENTAL DISABILITIES

PLANNING AND ADVISORY COUNCIL

THE COUNCIL



## SECTION 2

## THE MONTANA STATE DEVELOPMENTAL DISABILITIES

## PLANNING AND ADVISORY COUNCIL

## THE COUNCIL

The Montana State Developmental Disabilities Planning and Advisory Council was established in 1971 by Gubernatorial Executive Order under the mandate of P.L. 91-517. In 1974, the Council received statutory authority (2-15-2204, MCA, see Table 2.1). During the same legislative session, 53-20-207, MCA, established five substate regional developmental disabilities advisory councils.

The state law establishes the members of the Council at a maximum of 22 members, all of whom are appointed by the Governor, and provides those members shall be:

- The director of the State Department of Institutions or a designee;
- the director of the State Department of Social and Rehabilitation Services or a designee;
- the director of the State Department of Health and Environmental Sciences or a designee;
- the Superintendent of the Office of Public Instruction or a designee;
- two members of the State Senate;
- two members of the State House of Representatives;
- four consumers or consumer representatives, at large;
- one member each of the five regional developmental disability advisory councils (they must also be consumers or consumer representatives);
- one member each of the following professional disciplines: medicine, law, psychology, social work and special education.

In 1977, the legislature amended the state law changing appointments of council members from one-year terms to a rotation procedure. The following is how 2-15-2204 (3)(a)(b)(c) described the appointments:

"(3)(a) Each member or his designee who served on the Council pursuant to subsection (2)(a) or (2)(b) of this section (i.e.,



agency directors or designees) shall serve for a term concurrent with his respective term as a director or the Superintendent of Public Instruction, as the case may be. Upon his removal from office, his or his designee's term as a member of the Council is automatically terminated and his successor in office or his successor's designee is automatically a member of the Council.

"(b) Each member who serves on the Council pursuant to subsection (2)(d) or (2)(e) of this section (i.e., legislators) shall be appointed or reappointed annually by the governor.

"(c) Eight of the members serving on the council pursuant to subsection (2)(c), (2)(f), or (2)(g) of this section (i.e., professionals, consumers, regional council representatives) shall be appointed or reappointed annually by the governor to serve for terms concurrent with the gubernatorial term and until their successors are appointed. The remaining six members serving on the council shall be appointed by the governor to serve for terms ending on January 1 of the third year of the succeeding gubernatorial terms and until their successors are appointed."

State Law (53-20-206, MCA -- see Table 2.2) charges the the Council with the following duties:

- advise SRS, other state agencies, councils, local government and private organizations on programs for services to the developmentally disabled;
- develop a plan for a statewide system of community-based services for the developmentally disabled;
- serve in any capacity required by federal law for the administration of federal programs for services to the developmentally disabled.

To clarify these responsibilities, the Council uses the following "Policy Statement":

"We, the members of the Montana Developmental Disabilities Planning and Advisory Council, in recognition of our obligations and responsibilities to the people of Montana, and to those citizens who are developmentally disabled, and having taken cognizance of changing societal conditions, do hereby declare and affirm this statement of policy and purpose, as follows:

"The Council shall continue to comply with the requirements of Federal and State Law and regulations and with those additional duties as prescribed by the Governor of Montana and as determined by the Council.

"The Council shall strengthen its advisory function by remaining vigilant to the needs of persons with developmental disabilities. The Council will also be vigilant to assure that those needs are being met by efforts in the public and private



) sectors, and to the national and international trends which will facilitate these efforts. The Council shall actively provide reasoned, current and competent advice on these issues.

"The Council shall continue to participate in planning activities and in the creation and formulation of the State Developmental Disabilities Annual Plan; and the Council shall emphasize the accuracy, appropriateness, realism and usefulness of the plan. The council shall also review and comment on other plans which have implications for developmental disabilities.

"The Council shall act as coordinator and catalyst in the provision of services by various public and private agencies, to the end that services will be complete as possible and as unduplicated as possible.

"The council shall solicit applications from and award grants to those agencies and persons who propose to perform high impact activity with potential for statewide significance and replication, including reasearch, investigation, analysis, demonstraiton and validation, and to other agencies and persons only when residual funds are available.

) "The Council shall encourage the strong and active advocacy of the legal and societal rights of persons with developmental disabilities, including but not limited to the rights of education, residential, employment and vocational, transportation and community activities and services.

"The Council shall exert its active influence in the interests of perfecting, extending, changing and completing the network of developmental disabilities services and programs in Montana by public and private agencies and organizations.

"The Council shall promote an adequate system to monitor developmental disabilities programs and services through a process of proposing, modeling, demonstrating, starting, encouraging and evaluating monitoring efforts on system-wide and individual bases, and by performing appropriate self-evaluation.

"The Council shall continually review its working relationship with other public and private agencies, and shall adjust to the demands and opportunities of changing circumstances and conditions.

"The members of the Council shall always be aware that their individual and collective efforts must be directed to the benefit of those Montanans with developmental disabilities."

ADOPTED, January 24, 1980

COUNCIL MEMBERSHIP --- see Table 2.3

## COUNCIL STAFF

State law authorizes the Council to "employ and fix the compensation and duties of the necessary staff," thus, Council hires and supervises staff. Council bylaws provide the Council Chair will supervise the Executive Director and the Executive Director will supervise all other staff. Salaries and grade levels for positions of Council staff are established according to the Statewide Personnel Classification and Pay Plan. The Montana Legislature authorized three full-time positions for the Council; staffing level is currently 2.6 FTE. The current staff are:

Clyde Muirheid --- Executive Director  
Deborah J. McCallum --- Administrative Assistant  
Louisa Schultz --- Administrative Aide

The Council's address is: State Planning Council  
25 So. Ewing  
Helena, MT 59601

And, its phone number is: 406/449-8325

Council staff implement all planning, evaluation, advocacy, public awareness and other activities of the Council. These activities include staffing three standing committees and the Interagency Planning Forum; providing technical assistance to grantees and follow-along in project development; acting as liaison to the state legislature; and acting as primary planner for all major activities. Table 2.4 outlines the activities, responsibilities and qualifications of the three staff positions.

## STATE ADMINISTERING AGENCY

The State Administering Agency is the State Department of Social and Rehabilitation Services, whose address is 111 Sanders Street (Post Office Box 4210), Helena, MT 59604. The person who is responsible for the actions of the agency is Dave Lewis, Director.

The functions and responsibilities of the Department of Social and Rehabilitation Services, as they relate to services for persons with developmental disabilities, include administration of the following programs:

- developmental disabilities
- public assistance
- medical assistance
- social services
- vocational rehabilitation
- aging services
- visual services

- children and youth services

Within SRS, the Developmental Disabilities Division (DDD) is primarily responsible for the statewide, community-based developmental disabilities program. This program is a system of services which utilizes contracts with and grants to local non-profit corporations to provide services to persons with developmental disabilities and their families. Under state law, these services may include the following:

- evaluation services
- diagnostic services
- treatment services
- day care services
- training services
- education services
- employment services
- recreation services
- personal care services
- domiciliary care services
- special living arrangements services
- counseling services
- information and referral services
- follow-along services
- protective and other social and sociolegal services
- transportation services

In addition, the DDD coordinates programs with other agencies for maximum and efficient provision of the services.

#### RELATIONSHIP BETWEEN COUNCIL AND ADMINISTERING AGENCY

The Council is allocated under state law to SRS for administrative purposes only. Under this provision (2-15-121, MCA), SRS shall:

1. direct and supervise the budgeting, recordkeeping, reporting and related administrative and clerical functions of the Council;
2. include the Council's budgetary requests in the departmental budget;
3. collect all revenues for the Council and deposit them in the proper fund or account;
4. print and disseminate for the Council any required notices, rules or orders adopted, amended or repealed by the Council.

Departmental procedures have been developed by SRS to fulfill these functions with various appropriate divisions within the agency assigning specific tasks.

## FISCAL CONTROL

Funds allocated under P.L. 95-602 as amended by P.L. 97-35 and P.L. 98-527 are granted to the State of Montana through the Council. These funds, plus any state matching funds, become a part of the Council's budget, which is a budget within SRS separate from all other SRS funds. All funds are received, disseminated and accounted for pursuant to the requirements of the Statewide Budgeting and Accounting System.

## ADMINISTRATION OF THE STATE PLAN

Procedures for administration of all developmental disabilities services and programs in Montana are mandated by provisions within state laws and administrative rules. The State Plan is implemented primarily by the following agencies, which are all represented on the Council:

- the Department of Social and Rehabilitation Services (SRS)
- the Department of Health and Environmental Sciences (HES)
- the Department of Institutions (D of I)
- the Office of Public Instruction (OPI)

One other agency, the State School for the Deaf and Blind, is administered by the State Board of Public Education, which, at the present time, is not represented on the Council. However, the superintendent of MSDB participates in the Interagency Planning Forum, and this person also presents to Council on a quarterly basis.

The functions of SRS are on pages 2.5 - 2.6.

HES has, within its department, the Bureau of Maternal and Child Health, which administers such programs as handicapped children's services, crippled children services, and early and periodic screening and diagnosis. Program responsibility for the following programs also rests within HES: health planning and resource development and preventive health services.

The Department of Institutions administers all state custodial and correctional institutions serving, among others, the following persons who are included within the activities covered in the State Plan:

- the mentally retarded
- the mentally ill
- the aged
- emotionally disturbed children

In addition, the Department of Institutions administers funds allocated for community mental health services throughout the state.



The Special Services Division of the Office of Public Instruction is responsible for state-level administration of special education programs throughout the state, including the federal Education for All Handicapped Children Act (P.L. 94-142).

TABLE 2.1

2-15-2204. Developmental disabilities planning and advisory council.

(1) The governor shall appoint a developmental disabilities planning and advisory council in accordance with the provisions of this section.

(2) The council is composed of 22 members and consists of the following:

(a) the directors of the departments of social and rehabilitation services, health and environmental sciences, and institutions, or their designees;

(b) the superintendent of public instruction or a designee;

(c) one recognized private professional in each discipline of medicine, law, psychology, social work, and special education;

(d) two members of the state senate;

(e) two members of the state house of representatives;

(f) four consumers or representatives of consumers or consumer organizations in the discipline of developmental disabilities; and

(g) one member of each of the five regional councils provided for in 53-20-207, who shall also be consumers or representatives of consumers or consumer organizations in the discipline of developmental disabilities.

(3) (a) Each member or his designee who serves on the council pursuant to subsection (2)(a) or (2)(b) of this section shall serve for a term concurrent with his respective term as a director or the superintendent of public instruction, as the case may be. Upon his removal from office, his or his designee's term as a member of the council is automatically terminated and his successor in office or his successor's designee is automatically a member of the council.

(b) Each member who serves on the council pursuant to subsection (2)(d) or (2)(3) of this section shall be appointed or reappointed annually by the governor.

(c) Eight of the members serving on the council pursuant to subsection (2)(c), (2)(f), or (2)(g) of this section shall be appointed or reappointed annually by the governor to serve for terms concurrent with the gubernatorial term and until their successors are appointed. The remaining six members serving on the council shall be appointed by the governor to serve for terms ending on January 1 of the third year of the succeeding gubernatorial term and until their successors are appointed.

(4) The council is allocated to the department of administrative purposes only and, unless inconsistent with the provisions of this section and 53-20-206, the provisions of 2-15-121 apply.

TABLE 2.2

53-20-206. Planning and advisory council. (1) The planning and advisory council may elect from among its members the officers necessary for the proper management of the council.

(2) The council may adopt rules governing its own organization and procedures.

(3) A majority of the members of the council constitutes a quorum for the transaction of business.

(4) The council may employ and fix the compensation and duties of necessary staff.

(5) A council member, unless he is a full-time salaried officer or employee of this state or any of the political subdivisions of this state, is entitled to be paid in an amount to be determined by the council, not to exceed \$25 for each day in which he is actually and necessarily engaged in the performance of council duties as provided for in 2-18-501 through 2-18-503. Members who are full-time salaried officers or employees of this state or any political subdivisions of this state are not entitled to be compensated for their service as members but are entitled to be reimbursed for travel expenses as provided for in 2-18-501 through 2-18-503.

(6) The council shall:

(a) advise the department, other state agencies, councils, local governments, and private organizations on programs for services to the developmentally disabled;

(b) develop a plan for a statewide system of community-based services for the developmentally disabled; and

(c) serve in any capacity required by federal law for the administration of federal programs for services to the developmentally disabled.

**TABLE 2.3  
MEMBERSHIP OF THE STATE COUNCIL  
APPOINTMENT UNDER P.L. 98-527**

REQUIRED REPRESENTATION	REPRESENTATIVE	TITLE	ORGANIZATION	COUNCIL TERM
State Agency	Dave Lewis	Director	Dept. of SRS	Term of Office
	Gail Gray	Spec. Ed. Manager	Special Services OPI	Term of Super.
	Jerry Hoover	Administrator MHRSD	D of I	Term of Director
	Richard Chiotti	Health Planning	HES	Term of Director
	Jan Brown	State Representative	Montana State Legislature	1-1-87
	Delwyn Gage	State Senator	Montana State Legislature	1-1-87
	Ron Miller	State Representative	Montana State Legislature	1-1-87
	Judy Jacobson	State Senator	Montana State Legislature	1-1-87
Higher Education	Michael M. Nash	Assistant Prof Facy Assoc/Adjunct	Montana Tech. U of M	1-5-87
	Frank Clark	Professor	U of M	1-2-89
Local Agencies	Vonnie Koenig	Member	Flathead County ARC	1-5-87
State P&A System	Gary R. Marbut	Board Member	Montana Advocacy Program	1-2-89

REQUIRED REPRESENTATION	REPRESENTATIVE	TITLE	ORGANIZATION	COUNCIL TERM
Non-governmental Agencies	Jean Bradford	Member	Region III Council	1-2-89
	Joyce Curtis	Member	Region II Council	1-2-89
	Susan Duffy	Member	Region V Council	1-5-87
	Denise Kagie	Member & Executive Director	Region IV Council Epilepsy Assoc of SW Montana, Inc.	1-2-89 1-2-89
	Peyton Terry	Member	Region I Council	1-2-89
	Allen Hartman	Physician	Billings Clinic	1-5-87
	Michael Nash	Lawyer & Consulting Forensic Psylgst	Private Practice	
University Affiliated Program	Frank Clark	Member	MUAP Advisory Council	1-2-89
Private, Nonprofit	Ted Maloney	Executive Director	Family Outreach	1-5-87
Persons with Developmental Disabilities Parents, Immediate Relatives or Guardians of Persons with Developmental Disabilities	Denise Kagie	Consumer		1-2-89
	Joyce Curtis	Grandmother		1-2-89
	Susan Duffy	Mother		1-5-87
	Vonnie Koenig	Mother		1-5-87
	Ken Kronebusch	Father		1-5-87
	Gary R. Marbut	Father		1-2-89
	Peyton Terry	Father		1-2-89
Immediate Relative or Guardian of Institutionalized Person with a DD	VACANT*			

\*The one vacant position, immediate relative or guardian of an institutionalized person with a developmental disability, called for in P.L. 9502 has proven difficult to fill. This can be attributed, in part, to the fact that Montana has demonstrated substantial leadership in the area of deinstitutionalization of persons with developmental disabilities. Council will, however, continue its efforts to identify an interested parent or guardian of an institutionalized person with developmental disabilities to fill this position.



MEMBERSHIP OF THE STATE PLANNING COUNCIL  
APPOINTMENT UNDER 2-15-2204 MCA

POSITION	REPRESENTATIVE	ADDRESS	COUNCIL TERM
State Representative	Jan Brown	906 Madison Avenue Helena, MT 59601	1/1/87
	Delwyn Gage	Post Office Box 787 Cut Bank, MT 59427	1/1/87
	Judy Jacobson	330 Black Tail Canyon Butte, MT 59701	1/1/87
	Ron Miller	513 -- 52nd Street So. Great Falls, MT 59401	1/1/87
State Agencies	Richard Chictti	Health Planning/HES Cogswell Building Helena, MT 59620	Term of Director
	Gail Gray	Special Services/OPI 1300 11th Avenue Helena, MT 59601	Term of Suprintdt
	Jerry Hoover	MHRSD/Department of Institutions 1539 11th Avenue Helena, MT 59601	Term of Director
	Dave Lewis	SRS 111 Sanders Helena, MT 59604	Term of Office
Private Professionals	Frank Clark, PhD	Dept. of Social Work University of Montana Missoula, MT 59812	1/5/87

POSITION	REPRESENTATIVE	ADDRESS	COUNCIL TERM
Private Professionals (Continued)	Joyce Curtis, RN	Box 699 Choteau, MT 59422	1/2/89
	Allen Hartman, MD	Billings Clinic P.O. Box 35100 Billings, MT 59101	1/7/87
	Mike Nash, PhD, JD	Dept. of Business & Economics Montana College of Mineral Science Technology Butte, MT 59620	1/1/87
	Douglas Schram	RR 1183 Great Falls, MT 59401	1/7/87
	Jean Bradford Region III	1718 Mariposa Billings, MT 59102	1/2/89
Regional Councils	Joyce Curtis Region II	Box 699 Choteau, MT 59422	1/2/89
	Susan Duffy Region V	340 North Avenue West Missoula, MT 59801	1/2/89
	Denise Kagie Region IV	2034 Locust Butte, MT 59701	1/2/89
	Peyton Terry Region I	Box 391 Glasgow, MT 59230	1/2/89
	H.P. Brown	2733 Fern Drive Great Falls, MT 59404	1/2/89
Consumers	Joyce Curtis	Box 699 Choteau, MT 59422	1/2/89
	Susan Duffy	340 N. Avenue West Missoula, MT 59801	1/2/89

POSITION	REPRESENTATIVE	ADDRESS	COUNCIL TERM
	Denise Kagie	2034 Locust Butte, MT 59701	1/2/89
	Vonnie Koenig	430 Church Drive Kalispell, MT 59901	1/7/87
	Ken Kronebusch	913 Mountain View Conrad, MT 59425	1/7/87
	Ted Maloney	825 Helena Avenue Helena, MT 59601	1/7/87
	Gary R. Marbut	310 Montana Building Missoula, MT 59802	1/2/89

**TABLE 2.4**  
**State Planning Council**

**Staffing Pattern**

Administrative Officer III	Administrative Asst III	Administrative Aide I
Conduct Planning Projects	Plan and/or Research Projects & Tasks	Make Meeting Arrangements
Conduct Special Projects/Assignments	Provide Technical Assistance to Contractors	Disseminate Information
Develop Annual State Plan for Council	Assist with Budget Development and Accountability	Maintain Files and Records
Serve as Liaison/Spokesperson to State & Federal Agencies	Participate in Policy/Procedure Development for Planning	Act as Public Information Contact
Supervise Grant Program	Act as Public Information Contact	
Staff Planning Committee	Originate Council Correspondence	
Supervise Staffing of Finance/Evaluation Committees	Staffing Finance & Evaluation Committees	
Develop Annual Budget	Provide Administrative Support	
Originate Correspondence & Supervise Gnr'l Office Routine	Produce Council Minutes and Other Mtg Records	



**DEVELOPMENTAL DISABILITIES PLANNING AND ADVISORY COUNCIL**

25 South Ewing - Room 506, Helena, MT 59620

(406) 449-8325

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Because of the need for cost  
saving, we have not reprinted  
Section 3: Scope of Services.

This section describes the services  
of the 24 organizations listed in  
the Table of Contents.

For a separate copy of this  
section, which totals 221 pages,  
please call the DDPAC office at  
449-8325.



SECTION 4

COUNCIL GOALS, OBJECTIVES AND FUNDING





## SECTION 4

### MONTANA STATE PLAN FOR DEVELOPMENTAL DISABILITIES SERVICES:

#### PRIORITY SERVICE AREAS

For the planning period 1987-89, the Montana State Developmental Disabilities Planning and Advisory Council has set three major service and advocacy goals. The direction and purpose of these goals are set against the backdrop of priority-service requirements in P.L. 98-527. In essence, these requirements ask that state councils activate, in their plans, at least two of four mandated service areas. These areas include:

1. Case Management Services
2. Child Developmental Services
3. Alternative Community Living Arrangements Services
4. Employment-Related Activities

For Plan-Year 1987, the State Council has selected, under auspices of the Developmental Disabilities Act of 1984, Child Development Services, Alternative Community Living Arrangements and Employment-Related Services

The selection of these service priorities rests on a process of: 1) estimated general and disability populations; 2) documented and estimated service needs and service gaps (based, in part, on 1985-86 data collected for the DOE Data Collection Tables 1 A - B through 11 A - B [see Appendix C1]; 3) state geographical characteristics; and, 4) interagency information exchange. The Council's Planning committee employs this process each new plan year. Section 1.0 of this three-year plan presents facts and figures connected with this service-determination process.

Within the range of these priority service areas (and as specified in Section 122 (b) (2) (D) of the Developmental Disabilities Act of 1984), the State council develops and pursues annual objectives and numerous practical activities aimed at improving and having an impact on services and on the quality of life in Montana for persons with developmental disabilities.

#### 1987 FEDERAL ALLOTMENT

The Montana State Developmental Disabilities Planning and Advisory Council anticipates a minimum federal allotment for Federal Fiscal Year 1987 of \$300,000. Allotments under P.L. 908-527 are appropriated on the basis of populations, extent of service and facility needs and of financial need. The details of this formula for determining each state's share of the total

appropriation is outlined in the 1984 regulation promulgating the federal Developmental Disabilities Program.

For FFY 1987, the Montana State Developmental Disabilities Planning and Advisory Council projects the expenditure of \$105,000 for Planning and Administrative activities and \$195,000 for grants and for projects of statewide significance. Table 4.2 presents a summary of these proposed developmental disabilities expenditures.

#### MONTANA STATE DEVELOPMENTAL DISABILITIES PLANNING AND ADVISORY COUNCIL:

#### CHART OF THREE-YEAR GOALS, OBJECTIVES AND ACTIVITIES

The following chart lays out Council goals, objectives and activities for the 1987 planning period. The itemized listing represents proposed events and initiatives, many of which are interrelated, for the Council's new (1987) federal fiscal year. Please note this plan is intended to be descriptive of a range of activities and potential initiatives for the coming year without implying funding commitments to any particular individual activity or set of activities. Priority Service Areas are Child Development Services, Alternative Community Living Arrangements and Employment-Related Activities.

TABLE 4.1

#### 1987 Service and Advocacy Plan

(Three-Year Goals and Objectives Effective:  
October 1, 1986 - September 30, 1989)

(Plan-Year Objectives and Activities Effective:  
October 1, 1986 - September 30, 1987)

THREE-YEAR GOAL 1: TO DEVELOP INNOVATIVE SERVICE CONCEPTS AND MODELS AND TO DEMONSTRATE THEIR RESULTS AND ADVANTAGES AND TO ENCOURAGE LONG-RANGE PLANNING AND PROJECTION REGARDING FUTURE NEED OF AND RESULTS FROM THESE AND OTHER DEVELOPMENTAL DISABILITIES SERVICES.

#### THREE-OBJECTIVES:

1. To encourage, foster and support 1) the development of needed and practical programs and service concepts for unserved and underserved persons; and, 2) the creation and implementation of staff development plans and strategies for these models.

2. to encourage and support interagency planning by means of a coordinated process involving appropriate interagency representation and an endorsed, comprehensive and unified state plan for all of Montana's citizens with developmental disabilities.

#### 1987 PLAN-YEAR OBJECTIVES

- A. To plan services and programs for 1) persons with non-traditional disabilities (i.e., disabilities other than mental retardation, epilepsy, cerebral palsy and autism); 2) persons known as Naive Offenders; and, 3) persons with developmental disabilities, with particular concern for Native Americans and other minorities, who are underserved or unserved by the current services network.
- B. To continue the regular, structured process of exchanging planning, service and program information between the state's major operating agencies, Council, regional councils and other organizations with vested interests in Montana's service system.

#### 1986 PLAN-YEAR ACTIVITIES

1. Foster increased interactions between state agencies and Native American organizations for improvement and expansion of developmental disabilities services to this segment of Montana's population.
2. Encourage increased involvement of Native Americans on Regional Developmental Disabilities Councils.
3. Continue to 1) support and work for the resolution of major issues in Montana's service system, specifically, deinstitutionalization, elimination of service deficiencies in existing services, expansion of existing services, and the creation of new and needed services including those for persons who are behaviorally inappropriate for presently available community-based programs; and, 2) assign and recommend priority efforts (e.g., innovative employment training; comparable, statewide services; standard eligibility criteria) in these major areas.
4. In cooperation with agencies such as the Departments of Institutions and Social and Rehabilitation Services, the Community Mental Health Centers, the Montana Association for Independent Disabilities Services, and the Montana University Affiliated Program Satellite, list and publish resources and initiatives for dually-diagnosed persons. And

provide periodic reports on these resources to the Interagency Planning Forum.

5. Continue the development and implementation of Council staff capacities to serve, in cooperation with the Montana Advocacy Program and other appropriate organizations, as a center for referral and needs information on developmental disabilities, and as a source for specialized informational materials for all persons, professional and private sector alike, who serve, or have the potential to serve, persons with developmental disabilities.
6. Support interagency awareness of planning and service activities through quarterly meetings of the Interagency Planning Forum (IAPF) and through IAPF involvement in the development and monitoring of the three-year Montana State Plan for Developmental Disabilities Services.
7. Review, at IAPF meetings, information about the existence and availability of formal training programs and activities for professionals and others who work with and for persons with developmental disabilities.
8. Survey, in cooperation with MUAPS, statewide, to what extent and in what ways volunteers participate in services and programs.

#### OUTCOME INDICATORS:

- a. Council fosters the planning for services and programs through one or both of the following: 1. Requests for Proposals (RFP's); and, 2. Studies, Surveys and Special Reports.
- b. Council continues its support and staffing of the quarterly meetings of the Interagency Planning Forum (IAPF).
- c. The Council maintains its contacts and information-sharing activities with known persons in the Native American community who continue to work with the Council in providing information and recommendations dealing with quality of life issues and initiatives.

1987 PROJECTED PLAN-YEAR FUNDING: Federal \$55,575.00  
State: \$18,525 Total: \$74,100.00

PRIORITY SERVICE AREA(S): Alternative Community Living Arrangements

DESCRIPTIVE ACTIVITY: Planning for and coordination of provision of an "array" of services statewide.



RESPONSIBLE AGENCY: Council and state agencies which provide or support the provision of services to persons with developmental disabilities.

THREE-YEAR GOAL II: TO FOSTER ACTIVITIES WHICH WILL MITIGATE THE EFFECTS OF HANDICAPPING CONDITIONS ON MONTANA'S CITIZENRY AND WILL ENHANCE THE DELIVERY OF PUBLIC SERVICES.

THREE-YEAR OBJECTIVES:

3. To encourage the identification of new and improved treatment procedures through activities of research and development on behalf of Montana's preschoolers with development disabilities.

4. To reduce the incidence of birth defects in Montana.

1987 Plan-Year Objectives:

- C. To continue support for mandate and expansion of preschool services, statewide, from birth for children with developmental disabilities.
- D. To maintain and expand prevention awareness activities developed under the DDPAC-sponsored birth defects/education projects.

1987 Plan-Year Activities:

- 9. Provide technical assistance and other staff/Council resources to encourage and support the mandate and expansion of preschool services in the state from birth for children with developmental disabilities.
- 10. Encourage and foster the development and implementation of developmental disabilities parent-to-parent resources and information capacities.
- 11. Work to keep the news media attuned to significant prevention activities in Montana by supporting the use of radio and television public-service announcements which outline prevention programs and individual choices for the prevention of developmental disabilities.
- 12. Encourage the establishment, in Montana, of a confidential, high-risk disabilities registry of infants which is based on



the utilization of the federally sponsored format for standardized birth-certificates.

OUTCOME INDICATORS

d. Council continues prevention activities by 1) monitoring prevention efforts in the state through its staff office; 2) fostering innovative prevention programs by hearing presentations and disseminating information; and 3) encouraging the demonstration of new and/or established prevention programs in the state.

e. Council provides for periodic presentation on preschool needs, innovative preschool services, and on the progress and the statewide accomplishments of the State Implementation Grant.

f. Council provides, where appropriate, information to the media on significant events and activities related to the creation, implementation and maintenance of developmental disabilities prevention programs and services.

g. Council monitors and records progress in the establishment of a systematic and confidential means of identifying newborns at risk of developmental disabilities and delays.

1986 PROJECTED PLAN-YEAR FUNDING: Federal: \$41,025.00  
State: \$13,975.00 Total: \$55,900.00

PRIORITY SERVICE AREA(S): Child Developmental Services

DESCRIPTIVE ACTIVITY: Provision of technical assistance to and the appropriate support of prevention activities statewide.

RESPONSIBLE AGENCY: Council, the Department of Health and Environmental Services and private, non-profit groups statewide.

THREE-YEAR GOAL III: TO TARGET RESOURCES ON THE MOVEMENT OF PERSONS WITH DEVELOPMENTAL DISABILITIES TOWARD GREATER INDEPENDENCE IN BOTH RESIDENTIAL AND VOCATIONAL SETTINGS.

THREE-YEAR OBJECTIVE:

5. To promote the exit of individuals from structured developmental disabilities services to allow for movement to programs offering increased independence in residential and vocational area of ability and to promote, as a consequence, the development of new and/or the modification of existing services which are within projected resources and which answer unmet

and other special needs of persons with developmental disabilities.

#### 1987 PLAN-YEAR OBJECTIVES

- E. To foster, formulate and contribute to changes in and improvements to Montana's established developmental disabilities system which will offer opportunities for new and specialized treatment settings.
- F. To provide for an improved transition process for individuals as they move from one setting or service component to another with special emphasis upon those individuals leaving the high school setting and entering the community-at-large as young adults.
- G. To encourage and support the organization and delivery of continuing education for all persons, professionals, paraprofessionals and volunteers alike, who work with developmental disabilities.
- H. To improve public awareness of developmental disabilities in terms of individual capacities, individual limitations and specific costs of services.
- I. To foster and support, in Montana, the nationwide initiative of competitive employment, supported work and working training sites in both the private and public sectors, for persons with developmental disabilities.

#### 1986 PLAN-YEAR ACTIVITIES

- 13. Encourage and otherwise initiate support of 1) transition services from school to community; and 2) the range of new and innovative employment training programs which contribute to increased opportunities for integration, independence, productivity for citizens with developmental disabilities.
- 14. Continue to support, and where appropriate, collaborate with the Montana Advocacy Program (MAP), in the development, statewide, of local advocacy programs which employ the principles of citizen advocacy and self-advocacy programs.
- 15. Monitor the need for and development of replicable recreational programs and services for Montana's citizens with developmental disabilities.
- 16. Encourage and assist in organizing innovative and needed training workshops and forums throughout the state, and continue involvement in the annual Montana Conference on Developmental Disabilities (MCDD) through staff participation on the MCDD steering committee.

17. Encourage a greater awareness of the need for and types of age-appropriate including, and in particular, services for persons who have entered into senior citizenship.
18. Support the progress of and keep the appropriate parties informed about the activities and progress of the development, implementation and use of the Individual Information System (IIS) by and through the Department of Social and Rehabilitation Services.
19. Support a continuing dialog between Child and Family providers and Native American persons on the needs of children, in particular, from birth through age six.
20. Investigate the availability and increase the awareness of high-technology equipment and devices for use by persons with developmental disabilities.

#### OUTCOME INDICATORS

#### PROJECTED 1987 PLAN-YEAR FUNDING:

Federal: \$55,575.00 (Employment), \$41,925.00 (Alternative Living); State: \$18,525 (Employment), \$13,975.00 (Alternative Living); Total: \$130,000.00

PRIORITY SERVICE AREA(S): Alternative Community Living Arrangements & Employment-Related Activities

DESCRIPTIVE ACTIVITY: Fostering the initiation and/or demonstration of needed services statewide

RESPONSIBLE AGENCY: Council and state agencies providing comprehensive services to persons with developmental disabilities.

(Reader's Note: Projected Plan-Year Funding levels are only estimates of priority-service expenditures.)

SUMMARY OF PROPOSED DEVELOPMENTAL DISABILITIES EXPENDITURES

FY ENDING 9/30/87

FEDERAL DD FISCAL YEAR ALLOTMENT \$300,000 (Anticipated) (DDSP 7.1)

A. ALLOCATIONS TO STATE AGENCIES BY SOURCE OF FUNDS (PROJECTED)

Designated State Agencies	Non-Federal Funds				Federal* Funds (2+3+4)	Total (5+6)
	State	Local	Non-Profit	Total (2+3+4)		
	1	2	3	4		
Developmental Disabilities Division	\$ 30,000	\$	\$	\$	\$ 90,000	\$ 120,000
Dept of Institutions	\$ 15,000	\$	\$	\$	\$ 15,000	\$ 30,000
Office of Public Inst.	\$ 65,000	\$	\$	\$	\$ 195,000	\$ 260,000
Total	\$ 110,000	\$	\$	\$	\$ 300,000	\$ 410,000

B. ALLOCATIONS TO STATE AGENCIES BY PURPOSE (PROJECTED)

Designated State Agencies	Total federal* \$ non-federal	Planning Council		Adminis- tration	Priority service areas					Employment	Other
			Other		Case Mgt.	Child develop.	Altern living				
1	2	3	4	5	6	7	8	9	10		
	F\$ 300,000	\$ 90,000	\$	\$ 15,000	\$	\$ 41,925	\$ 97,500	\$ 55,575	\$		
	NF\$ 110,000	\$	\$	\$	\$	\$	\$	\$	\$		
	F\$	\$	\$	\$	\$	\$	\$	\$	\$		
	NF\$	\$ 30,000	\$	\$ 15,000	\$	\$ 13,975	\$ 32,500	\$ 18,525	\$		
	F\$	\$	\$	\$	\$	\$	\$	\$	\$		
	NF\$	\$	\$	\$	\$	\$	\$	\$	\$		
	F\$	\$	\$	\$	\$	\$	\$	\$	\$		
	NF\$	\$	\$	\$	\$	\$	\$	\$	\$		
Subtotals	NF\$	\$ 90,000	\$	\$ 15,000	\$	\$ 13,975	\$ 32,500	\$ 18,525	\$		
	F\$	\$ 30,000	\$	\$ 15,000	\$	\$ 41,925	\$ 97,500	\$ 55,575	\$		
	NF\$	\$	\$	\$	\$	\$	\$	\$	\$		
Total	\$ 410,000	\$ 120,000	\$	\$ 30,000	\$	\$ 55,900	\$ 130,000	\$ 74,100	\$		



SECTION 5  
ASSURANCES





## SECTION 5

### ASSURANCES

- 5.1 The State assures that each designated State agency will make such reports, in such form and containing such information, as the Secretary (of Health and Human Services) may from time to time reasonably require, and keep such records and afford such access thereto as the Secretary finds necessary to verify such reports. (Section 122)
- 5.2 The State assures that it will maintain such fiscal control and fund accounting procedures as may be necessary to assure the proper disbursement of and accounting for funds paid to the State under Part B of this Act. [Section 122(b)(1)(D)]
- 5.3 The State assures that it will establish a method for the periodic evaluation of the plan's effectiveness in meeting the objectives set forth in the plan. [Section 122(b)(2)(E)]
- 5.4 The State assures that funds paid to the State under Section 125 will be used to make a significant contribution toward strengthening services for persons with developmental disabilities in the various political subdivisions of the State. [Section 122(b)(3)(A)]
- 5.5 The State assures that part of the funds (under Part B) will be made available to public or nonprofit private entities. [Section 122(b)(3)(B)]
- 5.6 The State assures that funds paid to the State under Section 125 will be used to supplement and to increase the level of funds that would otherwise be made available for the purposes for which Federal funds are provided and not to supplant such non-Federal funds. [Section 122(b)(3)(D)]
- 5.7 The State assures that there will be reasonable State financial participation in the cost of carrying out the State Plan. [Section 122(b)(3)(E)]
- 5.8 The State assures that services furnished, and the facilities in which they are furnished, under the plan for persons with developmental disabilities will be in accordance with standards prescribed by

the Secretary in regulations. [Section 122(b)(5)(A)(i)]

- 5.9 State assures that buildings used in connection with the delivery of services assisted under the plan will meet standards adopted pursuant to the Architectural Barriers Act of 1968. [Section 122(b)(5)(A)(ii)]
- 5.10 State assures that services are provided in an individualized manner consistent with the requirements of Section 123 (relating to habilitation plans [Section 122(b)(5)(B)])
- 5.11 The State assures that the human rights of all persons with developmental disabilities who are receiving treatment, services, or habilitation under programs assisted under this title will be protected consistently with Section 110 (relating to the rights of persons with developmental disabilities). [Section 122(b)(5)(C)]
- 5.12 The State assures that special financial and technical assistance shall be given to agencies or entities providing services for persons with developmental disabilities who are residents of geographical areas designated as urban or rural poverty areas. [Section 122(b)(4)(F)]
- 5.13 The State assures that it has undertaken affirmative steps to assure the participation in programs under this title of individuals generally representative of the population of the State, with particular attention to the participation of members of minority groups. [Section 122(b)(5)(D)]
- 5.14 The State assures that there has been provision for the maximum utilization of available community resources, including volunteers. [Section 122(b)(6)(A)]
- 5.15 The State assures that the composition of the State Planning Council meets the requirements of Section 124. [Section 122(b)(1)(A)]
- 5.16 The State assures that it will take affirmative action to employ and advance in employment qualified handicapped individuals on the same terms and conditions required with respect to the employment of such individuals by the provisions of the Rehabilitation Act of 1973. (Section 109)

- 5.17 The State assures it will provide the State Planning Council with a copy of each annual report and plan of corrections for cited deficiencies prepared pursuant to Section 1902 (a)(31)(B) of the Social Security Act (42 USCS 1396a(a)(31)(B) with respect to any intermediate care facility for the mentally retarded in such State within 30 days after the completion of each such report or plan.
- 5.18 The State assures it will provide for fair and equitable arrangements (as determined by the Secretary after consultation with the Secretary of Labor) to protect the interests of employees affected by actions under the plan to provide alternative community living arrangement services, including arrangements designed to preserve employee rights and benefits and to provide training and retraining of such employees where necessary and arrangements under which maximum efforts will be made to guarantee the employment of such employees.

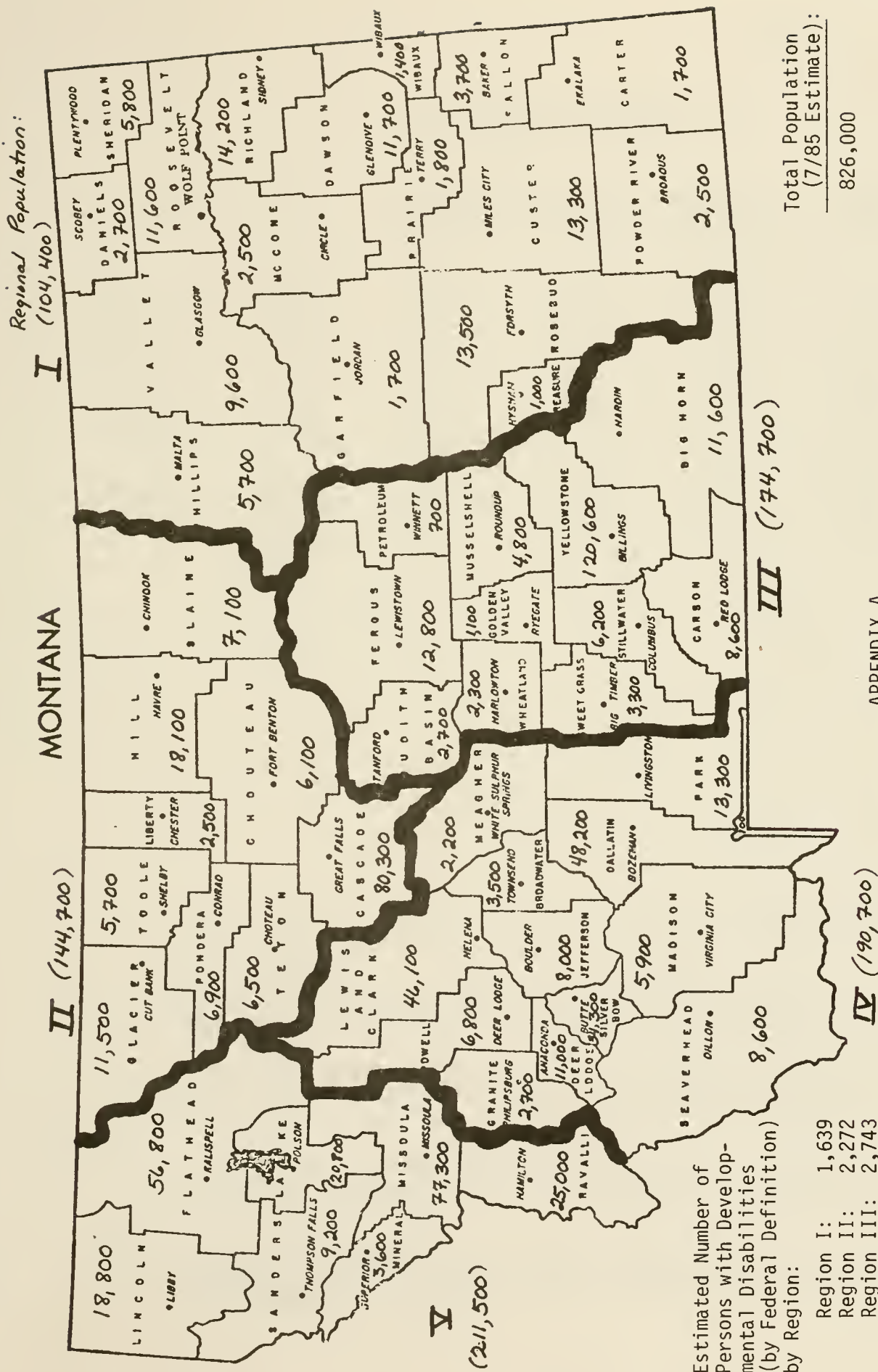


SECTION 6

APPENDICES







APPENDIX A  
APPROXIMATE POPULATION BY COUNTY (7/85 Estimates)



APPENDIX B

ESTIMATES OF THE DD POPULATION  
(1985 Estimates)

	<u>Total</u>	<u>Minority (5.9%)(2)</u>	<u>DD Pop (1.57%)(3)</u>	<u>DD Pop (5.44%)(4)</u>	<u>DD Pop (3%)(5)</u>
Region I	104,400	6,160	1,639	5,679	3,132
Region II	144,700	8,537	2,272	7,872	4,341
Region III	174,700	10,307	2,743	9,504	5,241
Region IV	190,700	11,251	2,994	10,374	5,721
Region V	<u>211,500</u>	<u>12,479</u>	<u>3,321</u>	<u>11,506</u>	<u>6,345</u>
	826,000(1)	48,734	12,969	44,935	24,780

\* \* \* \* \*

- (1) State population estimates are derived from July 1, 1985 U.S. Census Bureau estimates.
- (2) Minority figures derived from 1980 Census of Population, Vol. I: General Population Characteristics.
- (3) Most current factor used in the Federal program (P.L. 95-602) to estimate persons with developmental disabilities based on the functional (Federal) definition.
- (4) For historical comparison only. This figure has been used, in past planning, to calculate the number of persons with developmental disabilities by State definition.
- (5) For historical comparison only. This figure included persons (Border-line Mental Retardation) who no longer count under either definition of developmental disabilities.



# APPENDIX C

## CURRENT SERVICE-CONSUMER POPULATION -- AS OF JULY 1986

	Total Served	In Services/On Waiting List	On Waiting List/ No Services
Adults	1,273	406	333
Children	831	59	216

### A. Developmental Disability Division Providers

	Day Programs	Vocational Placement	Group Homes	Independent Living	Transitional Living
Adults	1,193	54	491	178	69
Children	0	0	60	0	0

### B. Department of Institutions

### C. Other

	Montana Devel- opmental Center	Eastmont	Warm Springs	Nursing Homes/ICFs	Social Services
Adults	205	55	20	180	1,273 *
Children	5	0	0	12	110

\* All persons in adult community services have a social worker assigned as case manager. Social services also provides case management for the 60 children in group homes and the approximately 50 children in foster homes.





OTHER POPULATION DATA

Total Population in State of Montana (July 1985 Estimate)	826,000
Minority Estimate (non-white) (5.9%)(1)	48,734
DD Population in Minority Estimate (1.57%)	765
Native American Estimate(1)	37,153(2)
DD Population in Native American Estimate (1.57%)	583
Estimated Number of Persons with Developmental Disabilities (Federal Definition - 1.57%)(3)	12,969
Estimated Number of Persons with Developmental Disabilities (State Definition - 5.44%)(3)	44,935
Estimated Population with Primary Diagnosis of Mental Retardation (3%)(3)	24,780
Unduplicated Count of Persons Receiving at least One Service Through the DD Division:	2,118
June 1986	
Adults	1,262
Children	856

\* \* \* \* \*

- (1) Derived from 1980 Census of Population, Vol. I: General Population Characteristics.
- (2) Of this number, 23,598 are on reservations.
- (3) See Section I: "Problems."



# APPENDIX E

## A LIST OF IMPAIRMENTS/FEDERAL DD DEFINITION

<u>IMPAIRMENT</u>	<u>DESCRIPTION</u>	<u>AGE OF ONSET</u>
Childhood Psychosis	An impairment in the mental or emotional functioning - deviating from the expected norms of behavior	4 - 7 years
Emotional Disturbance	As above except children so labeled in this category showing symptoms of learning disabilities	School-age
Mental Illness	An impairment in the mental or emotional functioning - deviation from the expected norms of behavior	From childhood on
Mental Retardation	Significantly sub-average general intellectual functioning which is associated with impairment in adaptive behavior	Birth or injury; Manifests at different ages
Muscular Dystrophy	Neuromuscular disease with progressive degeneration of the skeletal or voluntary musculature of the body; Five types; Duchenne is usually fatal	Duchenne type: 2 - 10 years; Varying ages for other types
Osteogenesis Imperfecta (tarda - mild form)	A crippling, incapacitating disfiguring disorder of connective tissues with fragile, brittle bones	Birth or later in life
Spina Bifida	A birth defect in which the vertebrae fail to develop around spinal cord	Birth

<u>IMPAIRMENT</u>	<u>DESCRIPTION</u>	<u>AGE OF ONSET</u>
Tourette's Syndrome	A movement disorder which causes erratic, involuntary spasmodic muscular movements	Between 2 & 15 years
Blindness or Severe Visual Impairment	A serious impairment in visual acuity	Birth or injury
Deafness	A whole or partial loss of the sense of hearing	Prelingual - birth to 3 years; Pre-vocational: to age 19 years
Huntington's Disease	A degenerative disorder of the central nervous system, usually fatal	Genetic disorder present at birth (25 or so); Childhood form: 12 - 14 years
Learning Disabled	The inability to learn, to perceive and/or to read, by accepted methods, despite normal or above-normal I.Q.	Birth
and		or
Minimal Brain Dysfunction (medical model)	As above, except that assault to the brain, depending on severity and area involved, may cause functioning retardation symptoms	Trauma
Cerebral Palsy	Spasmodic whole or partial paralysis due to cerebral lesion	Birth or Trauma
Epilepsy	A convulsive disorder of the central nervous system due to abnormal electrical discharges of brain cells	Birth or Trauma
Autism	Severe disorders of behavior and communication	Birth

# APPENDIX F

## COMPONENTS OF THE SEVEN MAJOR LIFE ACTIVITIES

ACTIVITY	DEFINITION	EXAMPLES OF SPECIFIC ACTIVITIES OF SKILLS	
Self Direction	Management and taking control over one's social and personal life. Ability to make decisions affecting and protecting one's own interests.	Self Concept:	self-esteem, self-confidence.
		Socialization:	affect, emotion, social awareness, emotional stability, leisure time activities, community involvement.
		Initiative:	responsibility, decision making.
		Orientation:	awareness of environment, responsiveness to environment.
Capacity for Independent Living	Age appropriate ability to live within extraordinary assistance from other persons, especially to maintain normal societal roles.	Housekeeping:	cleaning, maintenance, making beds, cooking, laundry, care of clothing.
		Family Support:	maintaining relationships, being a spouse, parenting.
		Money Management:	budgeting, purchasing, keeping track of expenditures, using money.
		Health and Safety:	selecting appropriate clothing, balanced nutrition, health and safety.
		Leisure Time Activities:	recreation, cultural activities, religious activities, social activities, clubs.
		Using the Community Resources:	using transportation, telephone, post office, stores, and other community resources.



ACTIVITY	DEFINITION	EXAMPLES OF SPECIFIC ACTIVITIES OF SKILLS	
Economic Self-Sufficiency	Maintaining adequate employment and financial support. Ability to earn a "living wage", net, after payment of extra-ordinary expenses occasionally by the disability. Absence or dependence on family or welfare for financial support.	Pre-Vocational and Vocational Skills:	ability to perform tasks required for a job, ability to learn new skills as needed.
		Work Adjustment:	promptness, work habits, adjustment to work environment.
		Job Finding:	ability to locate appropriate work, interviewing skills, presentation of self.
		Income:	earning capacity.
Self Care	Daily activities which enable a person to meet basic life needs for food, hygiene and appearance.	Eating:	drinking, mealtime manners, use of utensils, mastication and swallowing.
		Hygiene:	toileting, washing and bathing, tooth-brushing.
		Grooming:	dressing, undressing, hair and nail care, care of clothing, overall appearance.
Receptive and Expressive Language	Communication involving both verbal and non-verbal behavior enabling the individual both to understand others and to express ideas/information to others.	Expressive:	use of oral or sign language or other intelligible gestures or sounds, use of mechanisms (such as letter boards or typewriters) for expression, and communication with others, voice control.
		Receptive:	understanding through listening, auditory comprehending, lip reading, comprehending other forms of communication (e.g., sign language, reading).

ACTIVITY	DEFINITION	EXAMPLES OF SPECIFIC ACTIVITIES OF SKILLS	
Learning	General cognitive competence and ability to acquire new behaviors, perceptions and information, and to apply experiences in new situations.	Cognition:	ability to understand information, recognition.
		Retention:	memory, knowledge.
		Reasoning:	ability to generalize, to conceptualize, to see relationships among pieces of information, to use abstract concepts.
		Pre-Academic and Academic Skills:	reading, writing, quantitative activities, shape and color recognition.
Mobility	Motor development and ability to use fine and gross motor skills. Ability to move one's person from one place to another with or without mechanical aide.	Movement:	crawling, walking, climbing, use of mobility and aids such as crutches, wheelchair, cane or walker.
		Gross Motor Control:	balance, posture, sitting, standing, rolling.
		Fine Motor Control:	manual dexterity, precision movements, ability to control or direct mechanical devices.
		Coordination:	eye-hand, perceptual-motor, body-motor.

EXPLANATION OF AREAS OF MAJOR LIFE ACTIVITY

ACTIVITY	DEFINITION OF ACTIVITY	POTENTIAL LIMITATIONS
Self-care	Daily activities which satisfy personal needs for food, hygiene, safety and appearance.	Regular assistance is required in eating or drinking, and/or assuring the individual's immediate personal safety.
Learning	Changes in an individual's behavior or perception; the process which results in such changes.	Requires aids and techniques in learning which require environments other than those usually assumed to be adequate, including: <ul style="list-style-type: none"> <li>- in the home or day care center, structured development play activities are needed, specific to the child's disability, rather than semi- or un-structured play.</li> <li>- in school, some instruction needs to take place in a sheltered classroom rather than in the mainstream.</li> </ul>
Mobility	Ability of the individual to negotiate distance using his or her own power or a personally controlled device.	Regular assistance or use of devices is required for life-support, locomotion, ambulation or mobility in the community.
Self-Direction	Ability of the individual to manage his or her personal and social behavior.	Requires regular counseling or supervision in dealing with self or group; requires behavior modification to achieve self-restraint, social interaction, self-respect or other adaptive behavior.
Economic Self-Sufficiency	Financial resources are available to meet both basic life support needs of the individual and his or her recreational needs.	Insufficient income or support for a person's (family's) basic and recreational needs.

ACTIVITY	DEFINITION OF ACTIVITY	POTENTIAL LIMITATIONS
Receptive & Expressive Language	Ability to understand language or others; ability to communicate ideas through language. Language may be spoken, written, sign language or other gesturing.	Requires some use of interpreters or devices to communicate to the individual and/or others.
Capacity	Ability to maintain a full and varied life in the community with little or no regular outside intervention in the living situation.	Requires daily assistance for maintaining a full life in the community and/or in decisions about money management, house-keeping and related activities.



## APPENDIX G

### OPERATIONAL DEFINITIONS OF MAJOR LIFE ACTIVITIES

1. Self-Care  
A person who has a long-term condition which requires that person to need significant assistance to look after personal needs such as food, hygiene and appearance. Significant assistance may be defined as assistance at least one-half of the time for one activity or a need for some assistance in more than one-half of all activities normally required for self-care.
2. Receptive and Expressive Language  
A person who has a long-term condition which prevents that person from effectively communicating with another person without the aid of a third person, a person with special skill or with a mechanical device, or a long-term condition which prevents him/her from articulating his thoughts.
3. Learning  
A person who has a long-term condition which seriously interferes with cognition, visual or aural communication, or use of hands to the extent that special intervention or special programs are required to aid that person in learning.
4. Mobility  
A person who has a long-term condition which impairs the ability to use fine and/or gross motor skills to the extent that assistance of another person and/or a mechanical device is needed in order for the individual to move from place to place.
5. Self-Direction  
A person who has a long-term condition which requires that person to need assistance in being able to make independent decisions concerning social and individual activities and/or in handling personal finances and/or protecting his/her own self-interest.
6. Capacity for Independent Living  
A person who has a long-term condition that limits the person from performing normal societal roles or which makes it unsafe for that person to live alone to such an extent that assistance, supervision or presence of a second person is required more than half the time.
7. Economic Self-Sufficiency  
A person who has a long-term condition which prevents that person from working in regular employment or which limits his or her productive capacity to such an extent that it is insufficient for self-support.





TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

HANDICAPPING CONDITION/AGE													
1 (A)	MENTALLY RETARDED												
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	0	1	18	21	14	5	
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx		1	6	10	3	13	
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	2	2	0	7	
(D)	DROPPED OUT	0	0	0	0	1	1	5	5	11	4	3	0
(E)	STATUS UNKNOWN	0	11	0	0	0	3	0	1	0	1	0	0
(F)	TOTAL (of rows A-F)	0	11	0	0	1	4	5	8	37	38	20	25

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

☐

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS  
REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State Montana

1 (B)	HANDICAPPING CONDITION/AGE									
ANTICIPATED SERVICES	MENTALLY RETARDED									
	Less than 16	16	17	18	19	20	21	Over 21	TOTAL	
(A) COUNSELING/GUIDANCE	39	17	14	21	23	16	13	2	145	
(B) EVALUATION OF VR SERVICES	5	2	2	30	21	16	11	-0-	87	
(C) PHYSICAL/MENTAL RESTORATION	9	1	0	1	2	0	3	2	18	
(D) VOCATIONAL/TRAINING SERVICES	31	20	20	36	31	18	14	2	172	
(E) TRANSITIONAL EMPLOYMENT SERVICES	16	10	6	14	17	11	15	-0-	89	
(F) VOCATIONAL PLACEMENT	2	4	12	24	19	13	14	-0-	88	
(G) POST EMPLOYMENT	-0-	2	-0-	10	9	6	11	2	40	
(H) MAINTENANCE	-0-	2	7	14	7	7	15	-0-	52	
(I) TRANSPORTATION	17	14	9	16	12	9	15	2	94	
(J) FAMILY SERVICES	6	1	7	8	4	3	6	-0-	35	
(K) INDEPENDENT LIVING	4;	1	9	13	11	10	16	3	67	
(L) RESIDENTIAL SERVICES	4	1	-0-	4	5	1	5	2	22	
(M) INTERPRETER SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	4	-0-	4	
(N) READER SERVICES	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2	
(O) TECHNOLOGICAL AIDS	5	-0-	1	-0-	2	-0-	2	-0-	10	
(P) OTHER SERVICES*	3	1	3	4	1	0	2	0	14	
(Q) NO SPECIAL SERVICES	0	0	0	1	4	2	2	0	7	
TOTAL (of rows A-F)	141	76	90	197	169	112	146	15	946	

\* SPECIFY OTHER SERVICES 1.  
2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

2 (A)		HANDICAPPING CONDITION/AGE											
		HARD OF HEARING											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	1	-0-	-0-
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	-0-	-0-	-0-
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	-0-	-0-	-0-
(D)	DROPPED OUT	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(E)	STATUS UNKNOWN	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(F)	TOTAL (of rows A-F)	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1	-0-	-0-

☐ CHECK BOX IF ALL RESPONSES TOTAL ZERO.

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

2 (B)

## HANDICAPPING CONDITION/AGE

ANTICIPATED SERVICES	Less than 16						HARD OF HEARING						Over 21	TOTAL
	16	17	18	19	20	21	16	17	18	19	20	21		
(A) COUNSELING/GUIDANCE	3	-0-	1	-0-	1	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	5
(B) EVALUATION OF VR SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(C) PHYSICAL/MENTAL RESTORATION	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(D) VOCATIONAL/TRAINING SERVICES	1	-0-	1	-0-	1	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	3
(E) TRANSITIONAL EMPLOYMENT SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(F) VOCATIONAL PLACEMENT	-0-	-0-	1	-0-	2	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	3
(G) POST EMPLOYMENT	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(H) MAINTENANCE	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(I) TRANSPORTATION	1	-0-	1	-0-	1	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	3
(J) FAMILY SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(K) INDEPENDENT LIVING	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(L) RESIDENTIAL SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(M) INTERPRETER SERVICES	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1
(N) READER SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(O) TECHNOLOGICAL AIDS	-0-	-0-	1	-0-	1	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	2
(P) OTHER SERVICES*	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(Q) NO SPECIAL SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
TOTAL (of rows A-F)	6	-0-	5	-0-	6	-0-	6	-0-	-0-	-0-	-0-	-0-	-0-	17

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

STATE: Montana

3 (A)		HANDICAPPING CONDITION/AGE											
		DEAF											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA							-0-	-0-	-0-	-0-	-0-	-0-
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT							-0-	-0-	-0-	-0-	-0-	-0-
(C)	REACHED MAXIMUM AGE							-0-	-0-	-0-	-0-	-0-	-0-
(D)	DROPPED OUT	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(E)	STATUS UNKNOWN	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(F)	TOTAL (of rows A-F)	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-



TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS  
REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State: Montana

3 (B)

HANDICAPPING CONDITION/AGE

ANTICIPATED SERVICES		Less than 16	16	17	18	DEAF				Over 21	TOTAL
(A)	COUNSELING/GUIDANCE	59	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	60
(B)	EVALUATION OF VR SERVICES	-0-	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	1
(C)	PHYSICAL/MENTAL RESTORATION	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(D)	VOCATIONAL/TRAINING SERVICES	-0-	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	1
(E)	TRANSITIONAL EMPLOYMENT SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(F)	VOCATIONAL PLACEMENT	-0-	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	1
(G)	POST EMPLOYMENT	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(H)	MAINTENANCE	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(I)	TRANSPORTATION	-0-	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	1
(J)	FAMILY SERVICES	-0-	-0-	1	-0-	-0-	-0-	-0-	-0-	-0-	1
(K)	INDEPENDENT LIVING	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(L)	RESIDENTIAL SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(M)	INTERPRETER SERVICES	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1
(N)	READER SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(O)	TECHNOLOGICAL AIDS	1	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1
(P)	OTHER SERVICES*	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(Q)	NO SPECIAL SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
TOTAL (of rows A-F)		61	-0-	6	-0-	-0-	-0-	-0-	-0-	-0-	67

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

HANDICAPPING CONDITION/AGE													
4 (A)	BASIS OF EXIT	SPEECH/LANGUAGE IMPAIRED											
		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	1	6	4	-0-	1
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	2	1	2	-0-	-0-	1
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	-0-	-0-	2
(D)	DROPPED OUT	-0-	-0-	-0-	-0-	-0-	1	1	1	-0-	-0-	1	-0-
(E)	STATUS UNKNOWN	1	2	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(F)	TOTAL (of rows A-F)	1	2	-0-	-0-	-0-	1	3	3	8	4	1	4

☐ CHECK BOX IF ALL RESPONSES TOTAL ZERO.

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State: Montana

4 (B)

HANDICAPPING CONDITION/AGE

ANTICIPATED SERVICES	SPEECH/LANGUAGE IMPAIRED										
	Less than 16	16	17	18	19	20	21	Over 21	TOTAL		
(A) COUNSELING/GUIDANCE	13	-0-	-0-	2	4	1	-0-	1	21		
(B) EVALUATION OF VR SERVICES	-0-	-0-	-0-	1	3	1	-0-	-0-	5		
(C) PHYSICAL/MENTAL RESTORATION	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
(D) VOCATIONAL/TRAINING SERVICES	-0-	-0-	1	4	6	1	-0-	1	13		
(E) TRANSITIONAL EMPLOYMENT SERVICES	-0-	-0-	-0-	1	3	1	-0-	-0-	5		
(F) VOCATIONAL PLACEMENT	-0-	-0-	-0-	2	-0-	-0-	-0-	1	3		
(G) POST EMPLOYMENT	-0-	-0-	-0-	-0-	5	1	-0-	-0-	6		
(H) MAINTENANCE	-0-	-0-	-0-	-0-	1	-0-	-0-	-0-	1		
(I) TRANSPORTATION	1	-0-	-0-	3	4	-0-	-0-	-0-	8		
(J) FAMILY SERVICES	13	-0-	-0-	-0-	2	-0-	-0-	1	16		
(K) INDEPENDENT LIVING	-0-	-0-	-0-	-0-	1	-0-	-0-	1	2		
(L) RESIDENTIAL SERVICES	-0-	-0-	-0-	-0-	1	-0-	-0-	-0-	1		
(M) INTERPRETER SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
(N) READER SERVICES	2	-0-	-0-	-0-	-0-	-0-	-0-	-0-	2		
(O) TECHNOLOGICAL AIDS	-0-	4	-0-	-0-	-0-	-0-	-0-	-0-	4		
(P) OTHER SERVICES*	5	-0-	1	-0-	1	-0-	-0-	1	8		
(Q) NO SPECIAL SERVICES	-0-	-0-	-0-	1	2	-0-	-0-	-0-	3		
TOTAL (of rows A-F)	34	4	2	14	33	5	-0-	6	98		

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

5 (A)		HANDICAPPING CONDITION/AGE											
		VISUALLY HANDICAPPED											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	1	-0-	-0-	-0-
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	1	-0-	-0-
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	-0-	-0-	-0-
(D)	DROPPED OUT	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(E)	STATUS UNKNOWN	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(F)	TOTAL (of rows A-F)	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1	1	-0-	-0-

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State: Montana

5 (B)

HANDICAPPING CONDITION/AGE

ANTICIPATED SERVICES	VISUALLY HANDICAPPED							Over 21	TOTAL
	Less than 16	16	17	18	19	20	21		
(A) COUNSELING/GUIDANCE	-0-	-0-	-0-	1	1	1	-0-	-0-	3
(B) EVALUATION OF VR SERVICES	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2
(C) PHYSICAL/MENTAL RESTORATION	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2
(D) VOCATIONAL/TRAINING SERVICES	-0-	-0-	-0-	1	1	1	-0-	-0-	3
(E) TRANSITIONAL EMPLOYMENT SERVICES	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2
(F) VOCATIONAL PLACEMENT	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2
(G) POST EMPLOYMENT	-0-	-0-	-0-	1	-0-	-0-	-0-	-0-	1
(H) MAINTENANCE	-0-	-0-	-0-	1	-0-	1	-0-	-0-	2
(I) TRANSPORTATION	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2
(J) FAMILY SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(K) INDEPENDENT LIVING	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2
(L) RESIDENTIAL SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(M) INTERPRETER SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(N) READER SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(O) TECHNOLOGICAL AIDS	-0-	-0-	-0-	-0-	1	-0-	-0-	-0-	1
(P) OTHER SERVICES*	-0-	-0-	-0-	1	1	-0-	-0-	-0-	2
(Q) NO SPECIAL SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
TOTAL (of rows A-F)	-0-	-0-	-0-	11	10	3	-0-	-0-	24

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

6 (A)		HANDICAPPING CONDITION/AGE												
		SERIOUSLY EMOTIONALLY DISTURBED												
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21	
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	9	9	10	-0-	2	
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	4	1	1	-0-	-0-	-0-	
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	4	2	2	-0-	-0-	-0-	
(D)	DROPPED OUT	-0-	-0-	-0-	-0-	-0-	-0-	4	1	2	1	-0-	-0-	
(E)	STATUS UNKNOWN	-0-	2	1	-0-	-0-	1	1	1	-0-	-0-	-0-	-0-	
(F)	TOTAL (of rows A-F)	-0-	2	1	-0-	-0-	1	13	14	14	11	-0-	2	

☐ CHECK BOX IF ALL RESPONSES TOTAL ZERO.



U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

6 (B)

HANDICAPPING CONDITION/AGE

ANTICIPATED SERVICES	SERIOUSLY EMOTIONALLY DISTURBED										TOTAL
	Less than 16	16	17	18	19	20	21	Over 21			
(A) COUNSELING/GUIDANCE	59	24	19	15	10	-0-	-0-	-0-	127		
(B) EVALUATION OF VR SERVICES	2	3	4	6	7	-0-	-0-	-0-	22		
(C) PHYSICAL/MENTAL RESTORATION	-0-	1	-0-	1	3	-0-	-0-	-0-	5		
(D) VOCATIONAL/TRAINING SERVICES	8	13	3	8	5	-0-	-0-	-0-	37		
(E) TRANSITIONAL EMPLOYMENT SERVICES	2	13	23	7	3	-0-	-0-	-0-	48		
(F) VOCATIONAL PLACEMENT	16	16	26	8	5	-0-	-0-	-0-	71		
(G) POST EMPLOYMENT	-0-	1	1	3	3	-0-	-0-	-0-	8		
(H) MAINTENANCE	2	3	1	2	1	-0-	-0-	-0-	9		
(I) TRANSPORTATION	2	1	1	2	2	-0-	-0-	-0-	8		
(J) FAMILY SERVICES	8	6	6	7	5	-0-	-0-	2	34		
(K) INDEPENDENT LIVING	-0-	2	1	3	2	-0-	-0-	-0-	8		
(L) RESIDENTIAL SERVICES	36	16	13	1	-0-	-0-	-0-	-0-	66		
(M) INTERPRETER SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
(N) READER SERVICES	14	3	-0-	-0-	-0-	-0-	-0-	-0-	17		
(O) TECHNOLOGICAL AIDS	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
(P) OTHER SERVICES*	1	-0-	1	-0-	-0-	-0-	-0-	-0-	2		
(Q) NO SPECIAL SERVICES	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-		
TOTAL (of rows A-F)	150	102	99	63	46	-0-	-0-	2	462		

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

7 (A)		HANDICAPPING CONDITION/AGE											
		ORTHOPEDICALLY IMPAIRED											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	-0-	1	-0-
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	1	-0-	-0-
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	-0-	-0-	-0-	-0-	-0-	-0-
(D)	DROPPED OUT	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	1	-0-	-0-
(E)	STATUS UNKNOWN	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
(F)	TOTAL (of rows A-F)	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-	2	1	-0-

☐ CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State: Montana

7 (B)	ANTICIPATED SERVICES	HANDICAPPING CONDITION/AGE							
		Less than 16	16	17	18	19	20	21	Over 21 TOTAL
(A)	COUNSELING/GUIDANCE	4	0	0	0	2	0	0	6
(B)	EVALUATION OF VR SERVICES	0	1	0	0	2	0	0	3
(C)	PHYSICAL/MENTAL RESTORATION	16	0	0	0	0	0	0	16
(D)	VOCATIONAL/TRAINING SERVICES	3	0	0	0	2	1	0	6
(E)	TRANSITIONAL EMPLOYMENT SERVICES	0	0	0	0	1	1	0	2
(F)	VOCATIONAL PLACEMENT	0	0	0	0	1	1	0	2
(G)	POST EMPLOYMENT	0	0	0	0	1	0	0	1
(H)	MAINTENANCE	0	0	0	0	1	0	0	1
(I)	TRANSPORTATION	0	0	0	0	1	0	0	1
(J)	FAMILY SERVICES	0	0	0	0	1	0	0	1
(K)	INDEPENDENT LIVING	1	0	0	0	1	0	0	2
(L)	RESIDENTIAL SERVICES	0	0	0	0	1	0	0	1
(M)	INTERPRETER SERVICES	0	0	0	0	0	0	0	0
(N)	READER SERVICES	0	0	0	0	0	0	0	0
(O)	TECHNOLOGICAL AIDS	0	0	0	0	0	0	0	0
(P)	OTHER SERVICES*	0	0	0	0	0	0	0	0
(Q)	NO SPECIAL SERVICES	0	0	0	0	0	0	0	0
TOTAL (of rows A-F)		24	1	0	0	14	3	0	42

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

8 (A)		HANDICAPPING CONDITION/AGE											
		OTHER HEALTH IMPAIRED											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	8	23	11	0	0
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	1	1	0	0
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	0	1	0	0
(D)	DROPPED OUT	0	0	0	0	0	0	2	5	7	1	0	0
(E)	STATUS UNKNOWN	0	0	0	0	0	0	0	0	0	1	0	0
(F)	TOTAL (of rows A-F)	0	0	0	0	0	0	2	13	31	15	0	0

☐ CHECK BOX IF ALL RESPONSES TOTAL ZERO.

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State: Montana

8 (B)

HANDICAPPING CONDITION/AGE

ANTICIPATED SERVICES

	OTHER HEALTH IMPAIRED										Over 21	TOTAL
	Less than 16	16	17	18	19	20	21					
(A) COUNSELING/GUIDANCE	1	0	3	6	5	0	0	0	0	15		
(B) EVALUATION OF VR SERVICES	0	0	1	5	3	0	0	0	0	9		
(C) PHYSICAL/MENTAL RESTORATION	1	0	0	1	0	0	0	0	0	2		
(D) VOCATIONAL/TRAINING SERVICES	0	0	1	2	3	0	0	0	0	6		
(E) TRANSITIONAL EMPLOYMENT SERVICES	0	0	0	5	2	0	0	0	0	7		
(F) VOCATIONAL PLACEMENT	0	0	0	1	1	0	0	0	0	2		
(G) POST EMPLOYMENT	0	0	0	0	0	0	0	0	0	0		
(H) MAINTENANCE	0	0	1	0	1	0	0	0	0	2		
(I) TRANSPORTATION	0	0	0	1	1	0	0	0	0	2		
(J) FAMILY SERVICES	0	0	4	5	2	0	0	0	0	11		
(K) INDEPENDENT LIVING	0	0	0	1	1	0	0	0	0	2		
(L) RESIDENTIAL SERVICES	0	0	1	0	2	0	0	0	0	3		
(M) INTERPRETER SERVICES	0	0	0	0	0	0	0	0	0	0		
(N) READER SERVICES	1	0	0	0	0	0	0	0	0	1		
(O) TECHNOLOGICAL AIDS	1	0	0	1	0	0	0	0	0	2		
(P) OTHER SERVICES*	32	0	1	1	0	0	0	0	0	34		
(Q) NO SPECIAL SERVICES	0	0	0	0	0	0	0	0	0	0		
TOTAL (of rows A-f)	36	0	12	29	21	0	0	0	0	98		

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

9 (A)		HANDICAPPING CONDITION/AGE											
		SPECIFIC LEARNING DISABILITIES											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	2	27	151	110	14	4
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	5	3	16	5	2	2
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	0	0	0	0
(D)	DROPPED OUT	0	0	0	0	2	8	21	24	31	19	1	0
(E)	STATUS UNKNOWN	0	5	0	5	0	6	13	2	6	3	1	0
(F)	TOTAL (of rows A-F)	0	5	0	5	2	14	41	56	204	137	18	6

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

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U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR,  
THE 1986-87 SCHOOL YEAR /

State: Montana

9 (B)

9 (B)		HANDICAPPING CONDITION/AGE										
ANTICIPATED SERVICES		Less than 16	SPECIFIC LEARNING DISABILITIES								Over 21	TOTAL
			16	17	18	19	20	21				
(A)	COUNSELING/GUIDANCE	89	74	66	100	56	16	2	2	405		
(B)	EVALUATION OF VR SERVICES	6	7	13	39	35	7	0	2	109		
(C)	PHYSICAL/MENTAL RESTORATION	3	3	0	4	0	0	0	0	10		
(D)	VOCATIONAL/TRAINING SERVICES	43	30	38	105	65	14	4	2	301		
(E)	TRANSITIONAL EMPLOYMENT SERVICES	14	15	17	45	31	7	2	0	131		
(F)	VOCATIONAL PLACEMENT	4	6	23	66	33	16	3	0	151		
(G)	POST EMPLOYMENT	0	1	3	17	14	0	1	0	36		
(H)	MAINTENANCE	6	5	1	10	10	1	1	2	36		
(I)	TRANSPORTATION	12	10	3	24	19	12	0	2	82		
(J)	FAMILY SERVICES	9	3	8	25	10	10	1	0	66		
(K)	INDEPENDENT LIVING	4	2	2	9	23	7	3	2	52		
(L)	RESIDENTIAL SERVICES	3	2	0	5	0	0	0	2	12		
(M)	INTERPRETER SERVICES	0	0	0	2	0	0	1	0	3		
(N)	READER SERVICES	8	3	3	18	5	1	1	0	39		
(O)	TECHNOLOGICAL AIDS	13	1	2	3	1	0	0	0	20		
(P)	OTHER SERVICES*	3	1	4	17	4	0	0	0	29		
(Q)	NO SPECIAL SERVICES	1	2	8	9	8	1	0	0	29		
TOTAL (of rows A-F)		218	165	191	498	314	92	19	14	1511		

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

10 (A)		HANDICAPPING CONDITION/AGE											
		DEAF-BLIND											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	0	0	0	0
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	0	0	0	0
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	0	0	0	0
(D)	DROPPED OUT	0	0	0	0	0	0	0	0	0	0	0	0
(E)	STATUS UNKNOWN	0	0	0	0	0	0	0	0	0	0	0	0
(F)	TOTAL (of rows A-F)	0	0	0	0	0	0	0	0	0	0	0	0

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State: Montana

10 (B)

HANDICAPPING CONDITION/AGE

	DEAF-BLIND							Over 21	TOTAL
	Less than 16	16	17	18	19	20	21		
ANTICIPATED SERVICES									
(A) COUNSELING/GUIDANCE	0	0	0	0	0	0	0	0	0
(B) EVALUATION OF VR SERVICES	0	0	0	0	0	0	0	0	0
(C) PHYSICAL/MENTAL RESTORATION	0	0	0	0	0	0	0	0	0
(D) VOCATIONAL/TRAINING SERVICES	0	0	0	0	0	0	0	0	0
(E) TRANSITIONAL EMPLOYMENT SERVICES	0	0	0	0	0	0	0	0	0
(F) VOCATIONAL PLACEMENT	0	0	0	0	0	0	0	0	0
(G) POST EMPLOYMENT	0	0	0	0	0	0	0	0	0
(H) MAINTENANCE	0	0	0	0	0	0	0	0	0
(I) TRANSPORTATION	0	0	0	0	0	0	0	0	0
(J) FAMILY SERVICES	0	0	0	0	0	0	0	0	0
(K) INDEPENDENT LIVING	0	0	0	0	0	0	0	0	0
(L) RESIDENTIAL SERVICES	0	0	0	0	0	0	0	0	0
(M) INTERPRETER SERVICES	0	0	0	0	0	0	0	0	0
(N) READER SERVICES	0	0	0	0	0	0	0	0	0
(O) TECHNOLOGICAL AIDS	0	0	0	0	0	0	0	0	0
(P) OTHER SERVICES*	0	0	0	0	0	0	0	0	0
(Q) NO SPECIAL SERVICES	0	0	0	0	0	0	0	0	0
TOTAL (of rows A-F)	0	0	0	0	0	0	0	0	0

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS

State: Montana

REPORT OF: (A) HANDICAPPED CHILDREN AND YOUTH EXITING  
THE EDUCATIONAL SYSTEM DURING THE  
1985-86 SCHOOL YEAR

11 (A)		HANDICAPPING CONDITION/AGE											
		MULTIHANDICAPPED											
BASIS OF EXIT		1-5	6-11	12	13	14	15	16	17	18	19	20	21
(A)	GRADUATION WITH DIPLOMA	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	2	4	1	0	0
(B)	GRADUATION THROUGH CERTIFICATE OF COMPLETION/FULFILLMENT OF IEP REQUIREMENT	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	1	4	0	3
(C)	REACHED MAXIMUM AGE	xxxx	xxxx	xxxx	xxxx	xxxx	xxxx	0	0	0	2	1	1
(D)	DROPPED OUT	0	0	0	0	0	0	0	0	1	0	0	0
(E)	STATUS UNKNOWN	0	0	0	0	0	2	0	0	0	0	0	0
(F)	TOTAL (of rows A-F)	0	0	0	0	0	2	0	2	6	7	1	4

☐ CHECK BOX IF ALL RESPONSES TOTAL ZERO.

TABLE 4

U.S. DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
SPECIAL EDUCATION PROGRAMS  
REPORT OF: (B) ANTICIPATED SERVICES NEEDED BY THESE  
HANDICAPPED CHILDREN AND YOUTH FOR  
THE 1986-87 SCHOOL YEAR

State: Montana

11 (B)

HANDICAPPING CONDITION/AGE

ANTICIPATED SERVICES				MULTIHANDICAPPED															
	Less than 16	16	17	18	19	20	21	Over 21	TOTAL										
(A) COUNSELING/GUIDANCE	1	0	2	4	4	1	0	3	15										
(B) EVALUATION OF VR SERVICES	1	0	1	5	4	2	3	0	16										
(C) PHYSICAL/MENTAL RESTORATION	1	0	1	3	1	1	0	0	7										
(D) VOCATIONAL/TRAINING SERVICES	1	2	0	6	6	3	3	0	21										
(E) TRANSITIONAL EMPLOYMENT SERVICES	1	0	0	5	4	1	1	0	12										
(F) VOCATIONAL PLACEMENT	0	0	0	4	4	1	3	0	12										
(G) POST EMPLOYMENT	0	0	1	3	1	1	3	0	9										
(H) MAINTENANCE	0	7	1	2	4	3	4	0	21										
(I) TRANSPORTATION	1	2	1	3	6	3	3	0	19										
(J) FAMILY SERVICES	1	0	0	3	1	1	3	0	9										
(K) INDEPENDENT LIVING	0	0	1	2	2	1	0	0	6										
(L) RESIDENTIAL SERVICES	0	0	0	2	2	1	4	0	9										
(M) INTERPRETER SERVICES	0	0	0	2	2	0	0	0	2										
(N) READER SERVICES	2	0	0	1	0	0	0	0	3										
(O) TECHNOLOGICAL AIDS	1	0	1	2	0	1	1	0	6										
(P) OTHER SERVICES*	2	0	1	2	0	1	3	0	9										
(Q) NO SPECIAL SERVICES	39	0	0	0	2	0	0	0	41										
TOTAL (of rows A-F)	51	11	10	49	41	21	31	3	217										

\* SPECIFY OTHER SERVICES 1.

2.

CHECK BOX IF ALL RESPONSES TOTAL ZERO.



PERS 2.10

DEPARTMENT OF SOCIAL AND  
REHABILITATION SERVICES

SECTION:  
GENERAL ADMINISTRATION

Personnel Policies and  
Procedures

SUBJECT:  
Reduction in Work Force

## PURPOSE:

This policy has been adopted for use by SRS administrators and managers whenever it is necessary to reduce existing staff. This policy supersedes SRS Personnel Policy No.2.10, dated May 19, 1986, and is drafted to be consistent with the Department of Administration's Policy 3-0155 (ARM 2.21.5005-2.21.5011). Familiarity with this policy is necessary if a reduction in employees is anticipated.

## DEFINITIONS:

A. For the purpose of implementing state and department RIF policies and procedures, the following definitions will apply:

1. "Effective date of layoff" means the date determined by the department to be the end of employment for an employee, allowing adequate time for 10 working days advance notice of layoff. See ARM 2.21.5006 (3).

2. "Hiring preference" means that a laid off employee will be hired for a position where he or she has made timely application for the position and demonstrates equal qualifications for the job with other applicants. Items which may be considered in determining qualifications are education, experience, knowledge, skills, abilities, specialized training, past work performance, results from any selection devices used, references and any other relevant information used to make this determination. This preference shall apply for a period of one year from the effective date of layoff unless a reinstatement offer is rejected by the employee or the employee accepts a permanent position with any state agency. Preference shall be applied in conjunction with other preferences required by state or federal law, and shall be available only to permanent employees.

3. "In the same class" means the same class with virtually the same job responsibilities.



## SECTION:

GENERAL ADMINISTRATION

## SUBJECT:

Reduction in Work Force

4. "New position" means a newly created position for which hiring is done in accordance with the provisions of E-3 of this procedure. New positions include substantially changed positions.

5. "Probationary employee" means an employee newly hired into state government or who has transferred from another state agency who must serve a six-month evaluation period. During this time, the employee's abilities to perform job duties and job conduct are assessed to determine if the employee should be retained beyond this six-month period and attain permanent status. A probationary employee who has been terminated because of a reduction in force has no hiring preference or reinstatement rights.

6. "Reduction in force" (RIF) means a management action taken for nondisciplinary reasons in which an employee is laid off from his or her present position. The RIF may take place for reasons including, but not limited to: elimination of programs; reduction in FTE's by the legislature; lack of work; lack of funds; expiration of grants; or reorganization. See ARM 2.21.5006 (1).

7. "Reinstatement right" means, for a laid off employee, the right to be reinstated to the position from which the employee was laid off or a position in the same class, when such a position becomes vacant in the department during the employee's one-year preference period. This right applies for a period of one year from the effective date of layoff unless the employee rejects a reinstatement offer and shall be available only to permanent employees. See ARM 2.21.5007 (5).

8. "Substantially changed positions" means positions whose functions are changed by more than 25%. If the position remains three-fourths the same, it is not considered to be substantially changed and therefore is not a new position. In determining whether a position has changed by more than 25%, actual job duties, as well as job descriptions will be reviewed.

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## SUBJECT:

Reduction in Work Force

9. "Work unit" means the agency, a division, a bureau, a section or any other logical grouping of employees, such as all department or division employees with similar job responsibilities.

PRELIMINARY  
MATTERS:

B. If possible, division administrators should do the following things before actually determining which positions are to be deleted.

1. Identify probationary employees and determine when the probationary period ends. Carefully consider the duties of the probationary employee to determine if the position is necessary or whether the duties could be reassigned. It may be more appropriate to terminate probationary employees before they become permanent, rather than having to layoff long-term employees.

2. Discuss the anticipated cuts with employees, through bureau chiefs and section supervisors. Allow the opportunity for discussion and suggestions on all facets of the situation. Ask for volunteers for part-time, job-sharing or reduced hours.

3. Union Contracts: Union contracts take precedence over SRS policy, D of A personnel policy and this procedure. If union employees are involved, check with SRS Personnel Services before taking action.

ACTION  
REQUIRED:

C. Identify Important Functions. Identify the functions which are important to the mission and responsibility of the division.

1. In identifying important functions, make decisions based on legal mandates, established department objectives and other documented bases.

2. List the functions identified in the order of importance. Document why certain functions are more important than others.

3. Consider whether less-important functions can be eliminated or combined.

## SECTION:

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## SUBJECT:

Reduction in Work Force

D. Identify Necessary Positions. Identify those positions which are necessary to perform the important functions of the division.

1. Consider combining work units and/or positions. At this point the work units to which necessary positions will be allocated should be defined. The work unit used for reorganization and/or RIF purposes could be a vertical configuration of employees (bureau, from chief down to support staff) or a horizontal configuration of employees (all department or division employees with the same job responsibilities).

2. If some positions are responsible for high priority as well as low priority functions, consider shifting of responsibilities.

3. Do not consider the capabilities or deficiencies of particular personnel at this point; look only at positions necessary to perform a function.

E. Match Employees with Necessary Positions.

1. Reduced Work Hours. For those work units where it is necessary to combine or reduce positions, decide whether reduced hours is an acceptable management substitute for eliminating positions.

a) In deciding whether reduced hours is an acceptable option in a work unit, managers should consider whether the result will be a more or a less-productive unit.

1) Example: Where six employees in a unit do substantially the same type of work and one position must be eliminated, it may be more productive to keep five employees full time and RIF one position.

2) Example: Where the workload in a work unit cannot be reduced, obviously reduced hours is not a practical option. In this case, the cuts should be made in other work units.

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## SUBJECT:

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b) In those work units where reduced hours is an acceptable option, explain to employees which functions must be reduced and explain that the employees in that work unit have the option of reducing their hours rather than have one or more positions eliminated. Written agreement between employees and employer is necessary to effect such an arrangement. If a union represents employees in the work unit, the union must also agree to the arrangement in writing. Employees who are given the option of reduced hours or demotion should be fully advised of their rights as set forth in paragraph c before implementation of a reduced hours arrangement.

c) Permanent employees whose hours are reduced solely to avoid a layoff in their work unit are not considered laid off employees. The following sections on reinstatement, leave, insurance and retirement do not apply. The section on preference applies subject to the limitation in the next paragraph. An employee may be eligible for unemployment compensation depending on the number of hours reduced.

Permanent employees who are demoted or whose hours are reduced solely to avoid a layoff will be given a hiring preference for other positions within SRS, but such preference would be secondary to the hiring preference of a laid off employee. The preference shall apply for a period of one year from the effective date of the demotion or reduction of hours unless the employee has accepted a permanent position with any other state agency. The employee must make timely application for the position and demonstrate equal qualifications for the job.

The department may eliminate any open positions and redistribute hours to those employees with reduced hours within a work unit.



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## SUBJECT:

Reduction in Work Force

2. In those work units where positions must be eliminated, laid off employees will constitute the following:

a) Persons in positions which are substantially changed; and

b) Persons in positions which are eliminated or will no longer be funded by the agency. Where several employees hold positions in the same class and have the same job responsibilities, determine which employee or employees to RIF based on the employees' skills and longevity, as follows:

1) Skill. This is an assessment of qualifications and experience; in determining level of skill, consideration should be given to:

- qualifications and experience to perform the duties of the specific position that will be retained;
- general qualifications and experience beneficial to future achievement of department goals and objectives;
- the performance on specific, related tasks to those required by the position which will be retained; and
- general performance history with the department. See ARM 2.21.5007 (2).

2) Longevity. This is length of continuous service in the department.

3) The level of skill among employees should be compared first. If skill does not differentiate between employees, length of service in the department should be considered. Where the skill level is the same, the employee with the most longevity should be retained. Where the skill level of one employee is clearly higher, that employee should be retained in the job.

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## SUBJECT:

Reduction in Work Force

4) Probationary employees must be terminated if a permanent employee in the same work unit has the necessary skills to perform the duties of the job. "Necessary skills" for purposes of this subsection means ability to perform the job responsibilities as determined by regular evaluation and selection criteria.

c) Document the selections which are made.

d) Personnel Services must concur with proposed RIF plans before implementation.

e) SRS Personnel and Legal will assist with the drafting of RIF letters and accompanying attachments relative to employee options and effect on benefits. An employee being laid off needs to be advised of what options are available relative to his or her benefits:

(1) Leave

(a) A laid off employee has the right to cash out accumulated annual leave and one quarter of sick leave earned after July 1, 1971 at the effective date of the layoff, unless the agency offers the following options and the laid off employee accepts one of them:

(b) At the agency's option, a laid off employee may be allowed to maintain accumulated annual and sick leave for a period of one calendar year from the effective date of layoff, even though terminated;

(c) At the agency's option, a laid off employee may use accrued vacation credits to delay the termination date in lieu of a lump sum payment. This does not alter the effective date of the layoff or extend the preference period. Leave balances can be verified with the local payroll clerk or Personnel Services. See ARM 2.21-5007 (9).



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## SUBJECT:

Reduction in Work Force

(2) Insurance

The employee may self pay into the state employee group benefit plan for 18 months from the the effective date of layoff. Details of this can be handled with the payroll technician in the Fiscal Bureau.

(3) Retirement (PERD)

An employee who wants to withdraw retirement contributions should obtain an "Application for Withdrawal of Contributions" form from the Fiscal Bureau. This form should be clearly marked at the top, "Reduction in Force," and sent to the Fiscal Bureau with the termination form. An application received by PERD by the 5th of the month will be refunded by the middle of the month and those received by the 20th will be refunded by the end of the month. If additional contributions are received after a terminating employee has received the expedited RIF refund of his/her contributions, a second warrant will be issued for the residual payment.

(4) Unemployment

An employee is eligible for up to 26 weeks of paid compensation. It is necessary to complete the "Initial Claim for Benefits and Request for Determination of Status" form (UI-202) as well as the Job Service Application (ES-511D) and give them to the job service. They will advise the employee what his/her weekly compensation rate will be. After filing, it takes approximately a week to receive unemployment benefits.

(5) Application Process

A laid off employee may be considered as an in-house applicant during the one-year preference period; however, it is the employee's responsibility to apply for any position for which he or she wants to be considered. A form will be included with the RIF letter for the employee to indicate whether he or she wants to receive SRS vacancy announcements and to indicate if he or she wants Personnel to notify the job service and other state agencies of the employee's availability.

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(6) Reinstatement Rights

If a position becomes available in the same class with the same responsibilities, an employee shall be reinstated to the position within the one-year preference period. For purposes of reinstatement, a position in the same class means a position in the same class with virtually the same job responsibilities. When making a reinstatement offer, it is not necessary to advertise the position. A reinstatement offer shall be made to the employee in writing. The offer will be in accordance with locations the employee has indicated on his/her RIF options form included with the RIF letter to the employee. The employee must accept or reject the reinstatement offer in writing within five working days following receipt of the offer. If a reinstatement offer is rejected by the employee or not answered within five working days, the employee loses all rights to the employment offered. The rejection ends the employee's reinstatement rights and hiring preference period.

(7) Hiring Preference.

A laid off employee will be hired for a position where he or she has made timely application for the position and demonstrates equal qualifications for the job with other applicants. This preference shall apply for a period of one year from the effective date of layoff unless a reinstatement offer has been rejected by the employee, or the employee accepts a permanent position with any state agency.

e) State policy requires employees be given written notice a minimum of 10 working days preceding the effective date of the lay-off. The MFT Union contract requires 20 working days notice and the MPEA contract 21 calendar days notice. Layoffs should be planned to give employees as much notice as possible. See ARM 2.21-5007 (4).

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3. Positions which are not substantially changed shall be retained by incumbents. To fill new positions, including substantially-changed positions, the normal recruiting process will be followed (see PERS 9.2); SRS Personnel Services will evaluate all applicants to determine if they have the required education and experience. A list of the applicants eligible for consideration in the next step of the selection process will be forwarded to the hiring authority. A structured interview, or any other selection device may be used to help determine the best-suited employee for the position. Education, experience, knowledges, skills, abilities, specialized training, past work performance, results from any selective devices used, references and any other relevant information may be used to make this determination.

## EXAMPLE:

The following example may be used as a guide in interpreting this policy.

Positions A, B, C, D and E are in the same work unit, which includes a supervisory position. All of the employees are permanent employees, except Employee C, who is probationary.

Positions A, B and C are virtually interchangeable; the employees in these positions are in the same classification and grade and have the same job responsibilities. Thus, positions A, B and C are in the same class. Positions D and E are different from the first three and different from each other, i.e., not in the same class.

Assume that two of the three positions (A, B and C) must be eliminated, and that one of the other three positions (D, E and Supervisory) must be eliminated. Who should be laid off?

Employee C will be terminated because he/she is probationary and must be terminated if a permanent employee in the same work unit has the skills for the job. Obviously, both A and B are so qualified. (Note: If Position D or E were the only position eliminated, it is possible that C could lose his/her job if either Employee D or E could

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demonstrate the skills to do C's job.) Of Employees A and B, who is laid off? Since both Employees A and B are permanent, they must be compared for skill level (see § E.2.b). Assuming the skill level is the same, the employee with the most longevity will retain his/her job. Assume this employee is Employee A.

With regard to the three remaining positions (D, E and Supervisory), it is determined that Position D will be eliminated. A few of the functions of the position will be transferred to the supervisor, approximately one-third will be transferred to position E and the rest of the functions will be eliminated. Who should be laid off?

Employee D is laid off because his/her position is eliminated (see § E.2.b, p. 6). Employee E is also laid off because his/her position has substantially changed (see definition of "substantially changed," p. 10 and § E.2.a).

Who may apply for the "new position" (position E) now open in the section?

Employees A, B, D and E may apply. Any employee in the Department, as well as any laid off employee of the Department, may apply. Employee C may not apply as an in-house applicant because laid off probationary employees lose all employment rights. If the position is advertised outside the Department, Employee C may apply but he/she will not have preference.

(Note that in this situation none of these employees has a right to be reinstated to Position E because Position E is a new position and neither of the laid off employees was laid off from that position or a virtually identical position.)

Who gets the job? Assume the job is advertised in-house, and Employees A, B, D and E apply. The best applicant will get the job; if there is a tie, the laid off employee will get the job.



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## SUBJECT:

Reduction in Work Force

What reinstatement and preference rights do the laid off employees have? The laid off permanent employees have a right to be reinstated to their old positions (assuming the positions have not been substantially changed) or to other positions which are "in the same class," as defined in this policy. Therefore, Employee B would have a right to be reinstated to his/her old position or, if Employee A resigns, to employee A's position. He/she does not have a right to be reinstated to Employee D's position if Employee D resigns, even if Employee B is qualified because the job responsibilities are different (i.e., the position from which he/she was laid off and position D are not "in the same class"). He/she does have a hiring preference with regard to position D but not a reinstatement right to it.

Pertinent Sections:

- \$ A. Definitions: Hiring Preference, "In the Same Class"; "New Position"; "Probationary Employee"; "Reinstatement Right"; "Substantially Changed Positions"
- \$ E.2 Which employees to RIF; Assessment of Skill and Longevity; Reinstatement Rights and Preference Period
- \$ E.3 Filling of substantially changed positions

043/2.10

## APPENDIX J

### Service Capacities Needed by 1989

The foregoing discussion on strategy envisions a four year process whereby higher functioning clients currently in community services will move to more independent work and residential settings. As progress is made in this area, some existing Day and Residential Programs would be converted to intensive treatment settings for providing more appropriate services to lower functioning clients. In order to implement these strategies, it will be necessary for the State to develop some service capacities which are not currently in place. It will be necessary also to strengthen and/or modify others. The following information identifies capacities which require development and/or modification.

### Alternative Semi-Independent Living Models

These would facilitate the movement of clients from the Community Home Program to more independent residential settings. The model most commonly mentioned by providers is that of semi-independent living facilities, characterized by clustered apartments or duplexes. This model would permit DD persons to maintain the proximity to one another which they have become accustomed to in the community home setting, and at the same time would permit increased independence according to their abilities. Unlike the current Semi-Independent Living Program, DD persons utilizing this new service model would be expected to require varying degrees of routine, perhaps daily, supervision. This supervision may focus on certain dressing tasks for physically handicapped clients, and include a variety of other tasks such as assistance with cooking, etc. The degree of supervision would be tailored to individual needs.

There are a variety of ways that needed supervision could be provided. One alternative may include specialized contracts with non-DD individuals to provide specific types of assistance during specific times of the day, such as at meal times, getting up times, and/or going to bed times. Another approach would be to employ an individual who would live in the apartment complex and provide a variety of specific services to a group of clients. One approach sometimes used involves paying certain DD individuals to assist others in areas where assistance is needed.

The major financial investment required in developing this capacity would be in the area of financing the living facilities themselves. This could be done by making use of the Section 202/8 Program of the United States Department of Housing and Urban Development. Alternatively, the Section 8 (rent subsidy) Program could be combined with private financing as is done in some states. The housing resource supplement to this report describes the variety of financing resources that are available to Montana to support needed developments in this area.



Financing the supervision needed may require an additional investment of State funds. It is sometimes possible, however, to obtain partial financing through creative uses of Federal Housing Financing resources. This can be determined only on the basis of a project-by-project analysis of any "excess" funds anticipated from HUD Section 8 rent subsidies after a monthly mortgage payment is made on a Section 8 substantial rehabilitation or new construction loan.

#### Increased Semi-Independent Living Training Support

The existing Semi-Independent Living Training Program would need to be increased to accommodate the additional numbers of clients who move from the community home to semi-independent living. This growth would need to be planned for as new semi-independent living settings are opened to ensure training needed for clients who move to these settings.

#### Increased Independent Living Capacity

It will be important to develop the State's capacity for independent living while the capacity for semi-independent living is developed, to avoid a bottleneck in later years at the semi-independent level. A major need is for available apartments at reasonable costs. It is recommended that the State seek a greater use of the HUD Section 8 "Existing" Program to assist clients in making their rent payments. This resource is outlined in the housing resource supplement to this report.

#### Increased Independent Living Support

As more and more DD clients "graduate" and move into independent living status, the State will need to ensure that the capacity of the Social Services System to support clients in these settings is adequate. Currently, Social Service Workers report difficulty in meeting the needs of clients in these settings. As the number of clients in these settings grows, it is expected that this will increase the difficulties experienced by Social Workers. Growth in the capacity of the Social Services System is needed, therefore, in order to support the planned addition of individuals in independent living.

#### Alternative Sheltered Work Models

These models are needed to facilitate the movement of clients from existing Work Activity Programs and to provide alternatives for clients who may be placed inappropriately in existing sheltered workshops. They would be designed for clients who are not expected to make a transition to competitive work in the foreseeable future, but who are capable of less supervised and more productive work than is offered by the Work Activity Program. These work

settings would pay clients more than the work activity settings. This would enable clients to better support themselves in a semi-independent living environment. These settings would also provide supervision to assist the client to develop work habits and skills needed to develop and maintain a consistent level of productivity. By placing certain clients in these settings, the State would ensure that other clients who may be expected to progress to competitive work are not blocked from the training that is available through specialized sheltered workshops. Financing alternative sheltered work models would probably require combining additional State funding with private business investments to create specialized industries for handicapped persons.

### Competitive Employment Capacities

As the result of an increased number of DD persons in long-term sheltered work, it may be expected that there will be an increased number of DD individuals over time who will move through existing specialized sheltered workshops and become candidates for competitive work. In order to appropriately serve these individuals, it will become necessary for the State to assess the capacities of the Rehabilitative Services Division to provide needed work training, job development, job placement, and follow-up for DD persons.

Currently, the capacity of the Division is severely limited in this regard. It may be expected that additional State funds would be needed to augment Federal funds currently available to the Division to provide these needed services.

### Alternative Reimbursement Rate Policy for Client Services

This policy will be needed:

1. To ensure more appropriate levels of program support for clients of widely varying functional capacities;
2. To ensure an adequate number of staff and reasonable compensation, particularly for community home staff; and
3. To equalize funding among providers.

The policy would establish a base-rate of reimbursement for each type of service offered, taking into account the number of staff considered necessary, and compensation levels which overcome the problems currently encountered, particularly among community home staff. The policy also would provide variations from this base rate to accommodate clients of varying functional capacities. It is recommended that the policy be linked initially to three major categories of clients: elderly, difficult to serve (maladaptive behavior, severe/profound handicaps), and others. Where necessary, alternative training standards would be developed to support reimbursement rates for these groups to give providers not only resource flexibility to serve clients appropriately, but also flexibility to structure programs and training which are appropriate.

The variable rates would be developed over four years on the basis of experience gained in programs which will have been converted to intensive care settings as a result of the movement of higher functioning clients. Once established, these rates would be used to support the movement of additional clients from the institutional setting. It will be important to allow time for the system to adjust itself to these new rates, modifying them as experience dictates.

When new rates are finally put in place, it is expected that providers would be reimbursed according to the number of clients served in different functioning categories. For example, if a provider serves few clients in the difficult-to-serve category, the overall reimbursement for that program may be lower than that to the provider who serves an unusually large number of such clients. Providers would, therefore, have an incentive to accept more difficult-to-serve clients; likewise, there would be less of a disincentive to support the movement of higher functioning clients since it will be understood that the acceptance of a lower functioning client for replacement would carry with it the potential of additional resources.

#### Regionalized Client Support Capacity

This capacity is needed to strengthen the community environment in which DD persons are served. Its development in conjunction with the other capacities identified in this section is required to ensure that DD clients in the community benefit to the maximum extent possible from the new and/or alternative service opportunities envisioned. Specifically, this capacity would: ensure, when possible, and augment, where necessary, the provision of those specialized services which are needed by clients but which are not available in the community; expand the training currently offered to direct service staff to include Social Services staff; and strengthen and formalize the relationships and interface among DD Services and Generic Services in the community.

More specifically, planning for this capacity should consider at least four components:

First, it should build on the existing Regional Clinical Training Program designed to train provider staff. It is recommended that this program be expanded in order to extend training to Social Services Workers on a regional basis. An assessment of the increased need for staff training, particularly in the areas of handling clients with maladaptive behaviors and/or severe handicaps, and the training capacity needed to train Social Services staff, may be expected to require a significant expansion in this important program. This expansion should be planned for immediately on the basis of an overall training plan, and implemented gradually over the next four years.

Second, formal linkages should be established between the Developmental Disabilities Division and the Department of Institutions to develop a capacity for Community Mental Health Centers to assist in serving DD clients with maladaptive behaviors. This may lead ultimately to the need



to establish a funding stream and associated standards which would support the capacities of Community Mental Health Centers to serve certain types of DD clients.

Third, formal linkages should be established between the Developmental Disabilities Division and the Aging Services Bureau to plan for an increased capacity of the Area Agencies on Aging to support the development of programs needed by elderly DD persons. Resulting initiatives by the Aging Services Bureau would yield increased opportunities for the inclusion of elderly DD persons in appropriate types of activities in the community.

Fourth, it is recommended that consideration be given to the development of regional resource teams of physicians, psychologists, speech therapists, and audiologists to provide direct client services in areas of the State where these capacities are not available to clients who require these specialized services. It is expected that these teams would have the capacity to move about the provider program sites both on on-call and on scheduled bases in order to conduct programs of specialized client training according to the requirements of the IHP's for individual clients.

#### Case Management

Implementation of the strategies cited above will require an overall improved system capacity to manage individualized planning for clients. This will be necessitated both by the increased level of client movement expected and by the decision by the State to intensify services to certain difficult-to-serve clients. In order to support the movement of clients, case managers will need to be able to spend more time with each client identified for movement, both on an individual client level and in the individual habilitation planning process for these clients. It will be necessary for the case manager to be thoroughly familiar with the clients' training needs relative to preparation for movement, and with the type of setting most appropriate for each client targeted for movement. This will provide the basis for the case manager to make an independent assessment as to whether the client is currently receiving the amounts and types of training needed in order to make whatever transition is appropriate in a timely fashion.

Case managers will also require specialized training in regards to the specialized needs and characteristics of difficult-to-serve clients. This will enable the case manager to be optimally effective in guiding individualized habilitation planning for these clients. The development of case managers' abilities to serve these clients is an essential component of the overall strategy for intensifying services to lower functioning clients.

Two components of an improved case management capacity require attention - caseloads and clarification of responsibilities between Social Services Workers and DDD Community Workers.

- . Caseloads. It is recommended that the State determine a caseload standard considered acceptable for providing case management services to DD clients. Based on the standard adopted, a plan should be put into effect for achieving this standard. Since it is expected that it may take two or more legislative bienniums to reach the overall standard, a goal should be set that represents a portion of the standard by 1985. In determining an acceptable standard, the State should consider the applicability of the experiences of other states. These experiences have indicated that DD caseloads should range between 25 and 50 clients, depending upon such factors as the size of the area covered and the needs of the clients for support. Another factor to be considered is the acknowledgement on the part of Social Services Workers that clients who live independently consume as much of their time, if not more, as clients with more severe handicaps. Taking this into account, along with the geographic characteristics of Montana, current excessively high caseloads, the current broad range of client functioning characteristics, and the increased range of services anticipated, it is likely that a reassessment of caseloads will result in the need to add significant numbers of case managers in order to serve DD clients appropriately.
- . Roles and Responsibilities Clarification. Clarification of case management roles and responsibilities between Social Workers and Community Workers is needed to ensure that all needed case management functions get performed and that duplication of effort is reduced, if not eliminated altogether. In refining these roles and responsibilities, other critical system functions should be considered, also, including:
  - . Case Finding
  - . IHP Implementation Monitoring
  - . DD Provider Monitoring

In the area of case finding, responsibility should be assigned formally either to the Developmental Disabilities Division or to the Social Services Bureau. When this decision is made, the responsible agency should prepare a process for discharging this function and advise all participants in the Community System accordingly.

The capacity of Social Services to conduct IHP implementation monitoring on a regular basis is a function of caseload size, apparently. Therefore, any real progress in this area will depend on the decisions reached with regard to caseloads.

DD provider contract monitoring should continue to be performed by the regional DDD office. To enhance the effectiveness of this function, however, the Division should strengthen the DDD provider contract instrument to ensure that provider responsibilities are sufficiently concrete and specific so that meaningful monitoring can take place. This would be necessary also in order for the Division to install a provider accountability system so that the Division has a specific recourse should a provider fail to fulfill specified contractual responsibilities.

### Facilities Modernization Financing Plan

This plan for addressing current and projected physical needs of existing community homes will place the State in the position of undertaking these needed improvements in a fashion that does not jeopardize the State's ability to make critically needed improvements in overall program capability. Without this plan, continued facilities deterioration and the demand for large amounts of State dollars to address these problems has high likelihood of taking precedence over service system modifications aimed at developing the capacities identified above.

The plan should contain a detailed list of needed facility improvements by facility and a schedule for making needed improvements. It should be linked to Federal Housing Financing Resources identified in the Housing Resources Supplement to this report and should contain an overall strategy for the development of these resources.

### DD System Management Strategy

In order to ensure that the system capacities identified in this study are in place by 1985, it is recommended that management resources available to the Developmental Disabilities Division at the central office level be allocated in a fashion that links them with critical objectives to be achieved. This will require first of all the preparation of a four year plan for obtaining specifically identified results in each of the previously mentioned areas. These include:

- . Semi-independent living alternatives;
- . Residential facilities financing;
  - to support independent living
  - to support facilities modernization
  - to support semi-independent living alternatives
- . Long-term sheltered work;
- . Competitive work development;
  - specialized job training
  - job development and placement
  - follow-up
- . Client-referenced reimbursement rates
- . Regionalized client support capability
- . Case management



The plan should recognize that while the DDD is not directly responsible for detailed planning leading to all capacities outlined above (e.g., Competitive Work Development is ultimately the responsibility of the Rehabilitative Services Division, Case Management is partially the responsibility of the Social Services Bureau, etc.), it should coordinate and monitor all such planning. Only in this way can a comprehensive planning effort be undertaken that will ensure coordination among the several departments and agencies involved.

The plan should recognize also the inter-relationships that exist among the several needed capacities. For example, in order to obtain an increased level of appropriate client movement, it will be necessary to consider not only the development of alternative vocational and residential settings, but also the impacts of these changes on case management and the demands these developments will place on additional resources. Moreover, any effort to obtain greater intensity of service capability for difficult-to-serve clients will need to consider not only higher staff-to-client ratios, but also increased community and staff support capability and alternative reimbursement rate schedules. Without a balanced approach to planning, it is possible that the State could find itself in the undesirable position of increasing certain expectations of the system without providing adequately for the system's capacity to meet these expectations.

An absolutely essential characteristic of the process whereby this planning is conducted would be its ability to span the bureaucracy to include any and all agencies which have responsibilities to serve the DD population in the community. It would also need to take information from the various levels of program administration, including the State, Regional and local decision points in DD services deliver. Finally, it would need to define the appropriate roles of the Regional and State DD Planning Councils in the overall planning effort. For example, Regional Planning Councils could have responsibility for documenting the extent of alternatives need to effect client movement and to intensify services to difficult-to-serve clients within a standard framework to be supplied by the State. The State Planning Council, on the other hand, could have responsibility for conducting and assessing alternative models which may be considered to address these needs, including those being used successfully in other states. The DDD, on the other hand, would be responsible to coordinate overall planning and at the same time would have the responsibility to establish and maintain formal planning mechanisms to support needed joint planning among State Agencies.

Based on the four year plan objectives, the DDD would allocate its available staff resources in a fashion that ensures that each major objective is effectively managed. The need for any additional specialized staff to manage identified tasks should be documented and provided for, either in some shifting of staff between central and regional offices or in short-term staffing expansion for time-limited specialized tasks. For example, the Division may acquire the services of a reimbursement rate specialist, a housing financing specialist, or a specialist in the field of developing long-term sheltered work industries for handicapped persons. These specialists would be asked to accomplish very specific objectives leading to the establishment of desired capacities and, upon completion of these tasks, would be terminated.



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